WennSoft

MobileTech

Installation & Administration Guide

Version: MobileTech 2025

Export date: 10/21/2025

Legal Declarations

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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 WennSoft 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 MobileTech Help[1].

Compatible Operating Systems

Refer to the MobileTech Readme or 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. We recommend that you perform the appropriate testing before 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 Support to obtain this service.

Prerequisite Applications

The following applications must be installed.

Signature

For compatibility requirements, see the Readme[2].

- Service Management
- TimeTrack

Microsoft .NET

If you do not already have these .NET applications installed on your computer, they will be installed when you install MobileTech.

1. https://wennsoft.atlassian.net/wiki/spaces/mt2025/pages/579145665/MobileTech+Help
2. https://wennsoft.atlassian.net/wiki/spaces/mt2025/pages/579142103/Readme+-+September+2025

Application	Version
MobileTech Sync Server	.NET 4.8 Full Framework
MobileTech Administration	.NET 4.8 Full Framework
MobileTech Client	.NET 4.8 Client Framework

Other System Requirements

Compatibility

To find a complete list of system requirements across all the Signature modules, refer to the System Requirements[3][4] documentation.

This table lists the tested and supported compatible versions of MobileTech 2025.

Software or device	Compatible versions
Operating Systems	• Android 15, 16 • iOS 18, 26 • Windows 10, 11
Signature Version IMPORTANT **If you are upgrading to Signature 2025,** you must upgrade to MobileTech 2025. However, if you are only upgrading your current MobileTech to MobileTech 2025, you can be on any of these compatible Signature versions.	• Signature 2025 • Signature 2024 (18.07b09)

Incompatibility

- The MSI (non-Windows Store) version of the Resco Mobile CRM available from the Resco website is no longer compatible with MobileTech. If you currently use the MSI version, you must migrate to the Windows Store version and should plan accordingly before upgrading.
- Flexible Forms are not compatible with Microsoft Windows 11.
- Servers running Cylance script control.

3. https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/104800118/System+Requirements
4. https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/104800118/System+Requirements

- MobileTech inventory transactions do not support Microsoft Dynamics GP Inventory Lots.

Obtain a Google Maps API Key

To use the Mapping feature on any device, you will need to obtain a Google Maps API key at https://cloud.google.com/maps-platform/pricing/. You will need the Maps JavaScript API (Maps > Dynamic Maps) and Geocoding (Places tab). Geocoding is required for setting coordinates. See Enter the Google Maps API Key (page 82).

> Microsoft announced on May 24, 2024, that they are deprecating Bing Maps. Customers using Bing Maps for Enterprise Basic or Free license will no longer be able to use Bing Maps for Enterprise services beyond **June 30, 2025**.

Other Resources

For more information about MobileTech and related applications, see these resources.

- **Readme**[5]**:** Describes the features and resolved issues in MobileTech and lists compatible software versions.
- **Signature User Guides:** Describe how to set up and use Service Management and TimeTrack, 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**[6]**:** Includes information about how to use Woodford to customize your application.

Access by User Role/Type

The following table describes the tasks a user has access to, based on their user type/role. The user with a sysadmin server role has access to all the tasks.

User Role/Type	Access to the Following Tasks
Sysadmin Server Role (does not need to be a 'sa' user)	• Create MobileTech Objects • Update Middle Tier Database • Create Middle Tier Database Clean Up Job • Load Data • Refresh Lookups • Manage Resco Administrator Accounts • Update Password Policy • Launch Resco Cloud Dashboard • Install Resco MobileCRM Client

5. https://wennsoft.atlassian.net/wiki/spaces/mt2025/pages/579142103/Readme+-+September+2025
6. https://www.resco.net/support/configuration/

User Role/Type	Access to the Following Tasks
'mobiletech' User	• Update Middle Tier Database • Load Data • Refresh Lookups • Manage Resco Administrator Accounts • Update Password Policy • Launch Resco Cloud Dashboard • Install Resco MobileCRM Client

Control Definitions

The chart below displays the control source for each entity item per MobileTech version. The cells are highlighted in green to identify whether there is a control change from the previous version.

		MobileTech 7.0			MobileTech 7.5			MobileTech 8.0			MobileTech 9.5 (and later)		
Entity Name	**Item**	**100% Resco**	**100% HTML**	**Both**	**100% Resco**	**100% HTML**	**Both**	**100% Resco**	**100% HTML**	**Both**	**100% Resco**	**100% HTML**	**Both**
Additional Work	Form		X			X			X			X	
	List		X			X			X			X	
Appointment	Form			X			X			X			X
	List			X			X		X			X	
Appointment Completion	Resolution			X			X			X			X
	Summary		X			X			X			X	
Appointment Status	List	X			X					X			X
Attachment	Form	X					X			X			X
	List			X			X		X			X	

		MobileTech 7.0			MobileTech 7.5			MobileTech 8.0			MobileTech 9.5 (and later)		
Call Resolution	Form	X			X			X			X		
	List	X			X			X			X		
Call Type	Form	X			X					X			X
	List	X			X			X			X		
Change Order	Form	X			X					X			X
	List	X			X				X			X	
Change Order Detail	Form	X			X					X			X
	List	X			X					X			X
Consumed Inventory	Form	X			X					X			X
	List	X			X				X			X	
Contract	Form	X			X					X			X
Contract Equipment	List	X			X					X			X
Cost Code	List	X			X					X			X
Customer	Form	X			X					X			X
	List	X			X				X			X	
Employee	Form	X			X			X			X		
	List	X			X			X			X		
Equipment	Form	X					X			X			X

		MobileTech 7.0			MobileTech 7.5			MobileTech 8.0			MobileTech 9.5 (and later)		
	List	X			X				X			X	
Extended Warranty Type	List	X			X			X			X		
Invoice	List	X			X					X			X
Job Cost Code	List	X			X					X			X
Job Safety Task	Form			X			X			X			X
	List		X			X			X			X	
Labor Expense	Form			X		X				X			X
	List	X			X[1]	X			X			X	
Location	Form	X			X					X			X
	List	X			X				X			X	
Location Contact	Form		X			X			X			X	
	List		X			X			X			X	
Manufacturer	Form	X			X			X			X		
	List	X			X			X			X		
Meter Reading	Form	X			X					X			X
	List	X			X				X			X	
Note	Form	X			X					X			X
	List	X			X				X			X	

		MobileTech 7.0			MobileTech 7.5			MobileTech 8.0			MobileTech 9.5 (and later)		
Pay Code	List	X			X			X			X		
Payment	Form	X			X					X			X
	Summary		X			X			X			X	
Purchase Order Detail	Form	X			X					X			X
	List	X			X				X			X	
Purchase Order Receipt	Form	X			X				X			X	
	List	X			X				X			X	
Purchase Order Receipt Detail	Form	X			X				X[2]			X	
	List	X			X				X[2]			X	
Problem Type	List	X			X			X			X		
Refrigerant Code	List	X			X			X			X		
Refrigerant Leak Sublocation	List	X			X			X			X		
Refrigerant Tracking	Form	X			X					X			X
	List	X			X				X			X	
Refrigerant Type	List	X			X			X			X		
Report	List	X			X				X			X	
Resolution Snippet	List	X			X				X			X	

		MobileTech 7.0			MobileTech 7.5			MobileTech 8.0			MobileTech 9.5 (and later)		
Service Call (New)	Form		X			X			X			X	
Service Call	Form			X			X			X			X
	List			X			X		X			X	
Service Call History	Form	X			X				X[3]			X	
	List	X			X				X[3]			X	
Site Inventory	List	X			X				X			X	
Sublocation	Form												X
	List	X			X			X			X		
Sub Task	Form	X			X				X[4]			X	
	List	X			X				X[4]			X	
Task	Form	X			X				X[4]			X	
	List	X			X				X[4]			X	
Task Material	List	X			X				X[4]			X	
Task Response	List	X			X				X[4]			X	
Task Response List Value	List	X			X				X[4]			X	
Timelog	Form			X		X				X			X
Timesheet Report Request	Signature		X			X			X			X	

		MobileTech 7.0			MobileTech 7.5			MobileTech 8.0			MobileTech 9.5 (and later)		
User Define 1	List	X			X			X			X		
User Define 2	List	X			X			X			X		
Work Crew	List	X			X			X			X		
Work Crew Employee	List	X			X				X			X	

1. The Labor Expense list on the home screen was updated to 100% HTML, whereas the list on the Appointment Completion form remains 100% Resco.
2. The Purchase Order Receipt Detail form and list were combined into one form. For a visual example, see PO Receipt Changes (page 13).
3. The Service Call History form and list were combined into one form. For a visual example, see Call History Changes (page 12).
4. All Task items were combined into one form. For a visual example, see Task Changes (page 14).

Training Resources

For Resco training information, see the following Resco resources:

- Javascript Bridge Reference[7]
- Resco Academy[8]
- Resco Developers YouTube Channel[9]

Common Offline HTML File Layout

1	Initial Settings
2	Create Items (toolbars, forms lists, etc) *if 100% offline html
3	Event Handlers
4	Load Options
5	Load Data
6	Toolbar Functions
7	Form or List Item Function
8	Form or List Executions

```
<script>
    //============== INITIAL SETTINGS ================
    var entityName = "customer";
    var sortDesc = false, sortSelector = 'customername';
    //============== OFFLINE/ONLINE DATA ================
    var entityListData;
    //============== SELECTED DATA ================
    var selected = { entityName: null };
    //============== FETCH DATA ================
    var requiredSetupOptions = [];
    var entityAttributes = ['id', 'customername', 'gpcustomernumber'];
    var listSortItems = [ ···
    var listSearchItems = ['customername', 'gpcustomernumber'];
```

7. https://www.resco.net/javascript-bridge-reference/
8. https://www.resco.net/academy/
9. https://www.youtube.com/user/RescoDevelopers

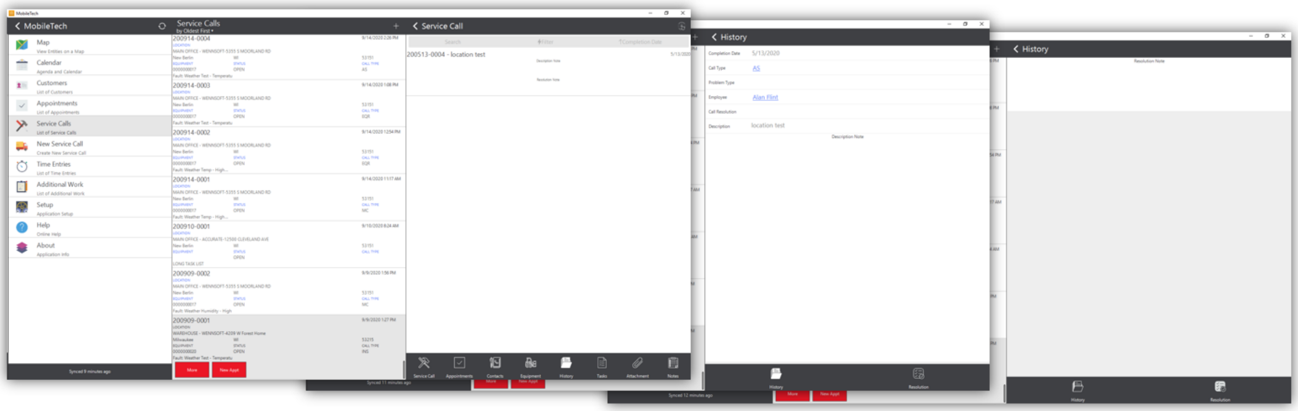
```
        var listFilterItems = [···
        var listItemTemplate = function (data, _, element) {···
        //============== TOOLBAR ITEMS ================
        var listToolbarItems = [···

        $(function () {
            //============== ANDROID CHECK ================
            MobileCRM.Platform.preventBackButton(btnBackClicked);

            //============== LOADPANEL ================
            loading = MobileCRM.UI.Form.showPleaseWait("Loading");

            //============== SCROLLVIEW ================
            mainScrollView = $("#mainScrollView").dxScrollView({···
            $(window).resize(function () {···

            //============== TOOLBARS ================
            listToolbar = $("#listToolbar").dxToolbar({···

            //============== LIST ================
            mainList = (new ListFactory()).createItem("#mainList", entityName, [···

            //============== EVENT HANDLERS ================
            MobileCRM.bridge.onGlobalEvent("EntityFormClosed", function (closedForm) {···
            MobileCRM.Configuration.requestObject(function (config) {···

            loadSetupOptions(loadListOptions);
        });

        //============== LOAD OPTIONS ================
        function loadListOptions() {···
        function loadToolbarOptions() {···
        function loadListItemOptions() {···

        //============== LOAD DATA ================
        function fetchListEntityData() {···

        //============== TOOLBAR FUNCTIONS ================
        function btnSortClicked() {···
        function sortSelected() {···

        //============== LIST ITEM FUNCTIONS ================
        function listItemClicked() {···

        //============== LIST EXECUTIONS ================
        function viewEntity() {···
    </script>
</body>
```

```
</html>
```

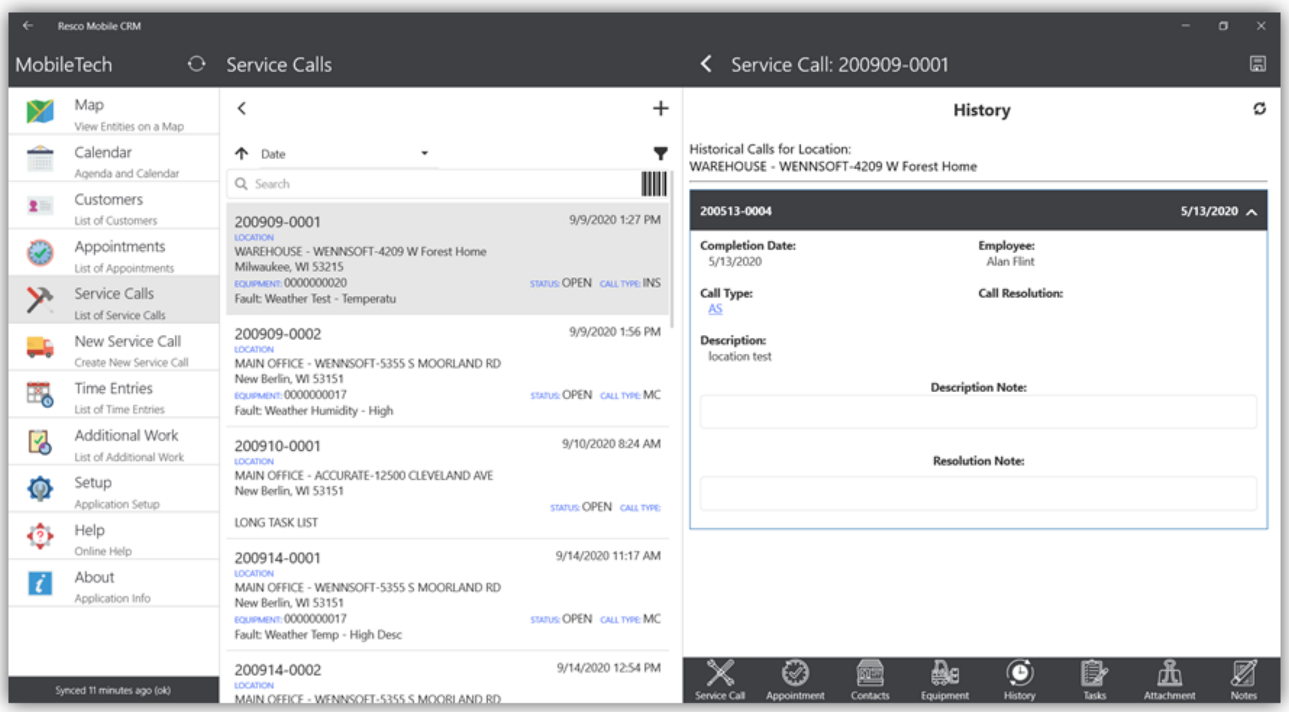
Call History Changes

The Service Call History form and list were combined into one form.

MobileTech 7.5



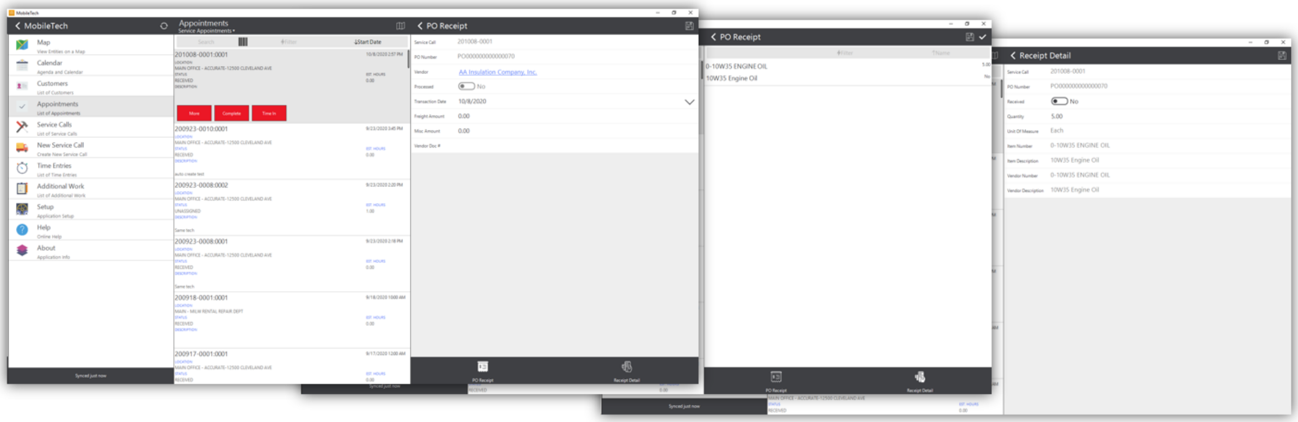
MobileTech 8.0 (and later)



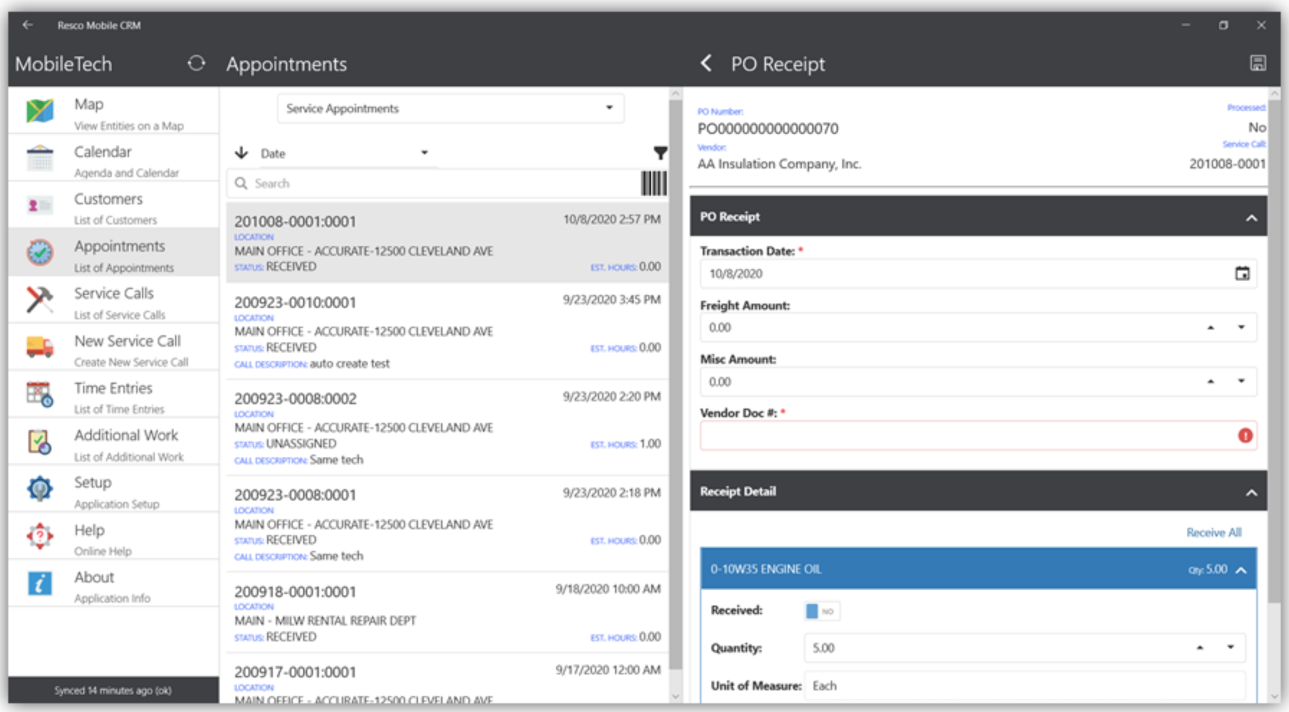
PO Receipt Changes

The Purchase Order Receipt Detail form and list were combined into one form.

MobileTech 7.5



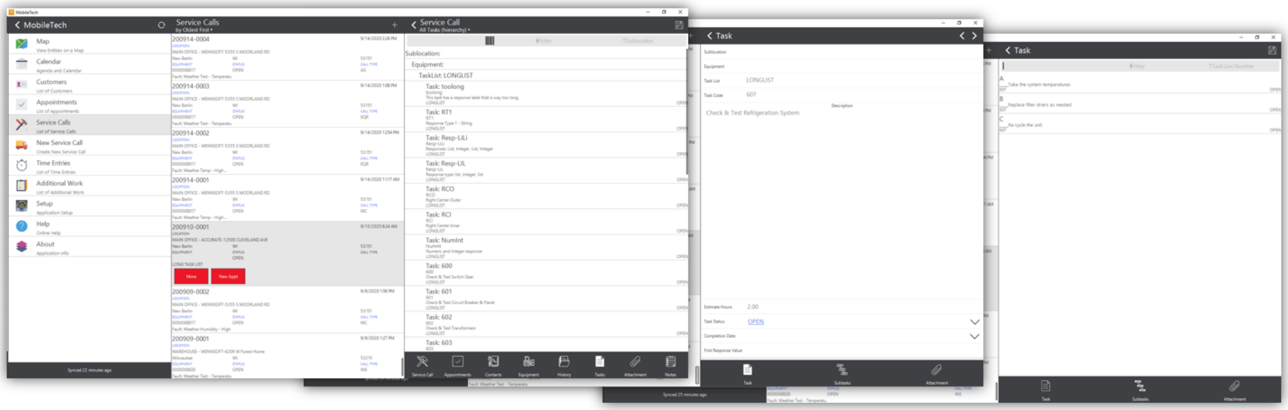
MobileTech 8.0 (and later)



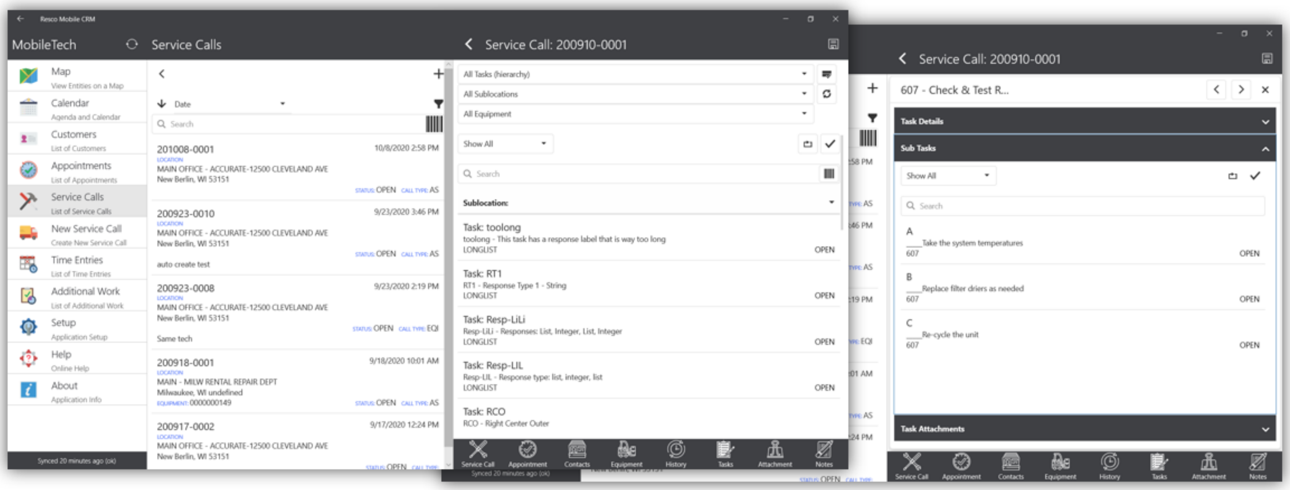
Task Changes

All Task items were combined into one form.

MobileTech 7.5



MobileTech 8.0 (and later)



Menu Navigation Overview

File

- **Registered Products:** Displays the registered MobileTech products and the user count.
- **Change Company** (page 75): Select to switch to another company.

- **About:** Displays the currently installed version of Signature and MobileTech Admin. You can also access online help and view the registered products.

View

- **Users** (page 71)**:** Select to set up new users and view/edit existing users.
- **Setup Options** (page 29): Select to update settings that control how MobileTech is used.

Tools

- **Create MobileTech Options** (page 29)**:** 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, you can do so by going to *Tools* > *Create MobileTech Objects*.
- **Update Middle Tier Database:** Select to update the Middle Tier. When updating MobileTech Admin, you are prompted to update the Resco middle tier, however, you can also do so manually.
- **Create Middle Tier Database Clean Up Job** (page 29): 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.
- **Load Data** (page 73): 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.
- **Refresh Lookups** (page 127)**:** Select this option to sync individual lookups in MobileTech to refresh a subset of lookups without loading all data.
- **Manage Resco Administrator Accounts** (page 125)**:** If you or another administrator forgets an admin account password, you cannot retrieve the existing password, but you can change it.
- **Manage Mobiletech Integration User** (page 125): If you or another administrator forgets the MobileTech Integration User account password, you cannot retrieve the existing password, but you can change it.
- **Update Password Policy** (page 27)**:** Use the Update Password Policy window to set up the complexity, password expiration, as well as lockout mode. In MobileTech Admin, select Tools > Update Password Policy.
- **Launch Resco Cloud Dashboard** (page 124)**:** Select to launch the Resco Cloud Dashboard in your default browser.
- **Install Resco Mobile CRM Client** (page 25)**:** Select to launch Resco's Mobile CRM Client download page in your default browser.

Installing or Upgrading MobileTech

Use these instructions when installing or upgrading MobileTech. For system requirements information, see the Other System Requirements (page 2).

After you install 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.

IMPORTANT

- **You can install MobileTech Server on any Microsoft Windows Server environment.** For specific versions, see the Signature System Requirements. MobileTech Server cannot be loaded in a non-Windows Server environment.
- **Before upgrading MobileTech**:
  - We recommend that you make a backup copy of the following files if you have made changes to these files. After upgrading you can reinsert your changes.
    - web.config
    - MobileTechAdmin.exe.config
    - XrmServer.SyncConsole.exe.config
  - Deactivate your current Woodford project.
- **A user with the sysadmin server role is required to perform the MobileTech installation or upgrade.** This user does not have to be the 'sa' user.
- **Disable any security software before installing MobileTech.** Remember to re-enable this once the installation is complete.

Install MobileTech Server

If you are upgrading MobileTech, see Upgrade MobileTech Server (page 18).

Step 1: Install MobileTech Server

You can install MobileTech Server on any Microsoft Windows Server environment. For specific versions, see the Signature System Requirements. MobileTech Server cannot be loaded in a non-Windows Server environment.

IMPORTANT

- The user who installs or upgrades MobileTech must have the sysadmin server role. This user does not have to be a 'sa' user.
- The MobileTech Server must be installed on same computer as the Internet Information Services (IIS) Site.

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 Monitor Processes and Tasks by Using Integration Monitor (page 127). An icon for MobileTech Integration Sync is added to your desktop. You can select 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 Import the MobileTech Woodford Project (page 21). 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. Select *Run as Administrator*.
3. If the User Account Control window displays, select *Yes* to continue with the installation.
4. The Welcome to the Prerequisites Setup Wizard displays if any prerequisite files need to be installed or updated. Mark the checkbox next to the required file(s) to be installed and select *Next*. The external setup window for each file opens. You may need to move the MobileTech Server Setup window to see the other setup windows. Complete the file installation(s). After you have installed the prerequisite files, return to the MobileTech Server Setup window and select *Next*.
5. In the Welcome window, click *Next*.
6. On the End-User License Agreement page, read and accept the terms of the license agreement and select *Next*.
7. 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 the instance where the Microsoft Dynamics GP database is installed.
    - **SA Password:** Enter the SQL system administrator password.
8. Select *Next*. The ODBC runs a connection test.
9. 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.
10. Select *Next*.
11. 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):** This is the email address that you will use to log into Woodford.
12. Mark the checkbox 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).
13. Click *Next*.
14. 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.
15. Select *Next*.
16. On the Select Installation Folder window, select *Browse* to select the location where MobileTech Server will be installed, or accept the default location C:\Program Files (x86)\Signature\MobileTech\.
17. Select *Next*.
18. On the Installing Signature MobileTech Server page, select *Install*.
19. The Administrator: Windows PowerShell command window opens to run a Resco script.
    Note: 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.
20. Press any key to close the command window.
21. On the Signature MobileTech Server Setup window select *Finish*.

Step 2: Install MobileTech Client

To install the MobileTech Client on a computer, see Install or Upgrade the MobileTech Client (page 25).

Step 3: Set up MobileTech Admin

After completing the installation steps, you will need to review the Setting up MobileTech (page 25) 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 select *Process*.

> 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 4: Import the MobileTech Woodford project

See Import the MobileTech Woodford Project (page 21).

Step 5: Complete additional setup

Review the Setting up MobileTech (page 25) section.

Step 6: Deploy SSRS Reports

See the Signature Reports Guide for information on deploying a report.

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 of the config files (optional) and then installing the latest version of MobileTech Server.

> For MobileTech 7.5 and prior, we recommend that you uninstall your current installation and then install the latest version of MobileTech.

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
>
> - Before upgrading MobileTech, your technicians will need to sync their devices and then delete the data on the devices. Once the upgrade is complete, your technicians can then sync their devices to view the new features.

- If you are changing the physical path with the upgrade installation, prior to upgrading, you will need to update the Physical Path in IIS Manager.

1. Open Windows Administrative Tools > Internet Information Services (IIS) Manager.
2. Under Sites, select **RescoCloud Server** and then select *Advanced Settings*.
3. Update the **Physical Path** and select *OK*.

Review the steps below carefully before you install the latest compatible version of Woodford.

Step 1: Make 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: Inactivate Active Woodford Projects

Before upgrading MobileTech, please mark any active Woodford projects as inactive in the Resco Cloud.

Step 3: Install MobileTech Server

You can install MobileTech Server on any Microsoft Windows Server environment. For specific versions, see the Signature System Requirements. MobileTech Server cannot be loaded in a non-Windows Server environment.

IMPORTANT

- The user who installs or upgrades MobileTech must have the sysadmin server role. This user does not have to be a 'sa' user.
- The MobileTech Server must be installed on same computer as the Internet Information Services (IIS) Site.

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 Monitor Processes and Tasks by Using Integration Monitor (page 127). An icon for MobileTech Integration Sync is added to your desktop. You can select 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 Import the MobileTech Woodford Project (page 21). 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. Select *Run as Administrator*.

3. If the User Account Control window displays, select *Yes* to continue with the installation.
4. The Welcome to the Prerequisites Setup Wizard displays if any prerequisite files need to be installed or updated. Mark the checkbox next to the required file(s) to be installed and select *Next*. The external setup window for each file opens. You may need to move the MobileTech Server Setup window to see the other setup windows. Complete the file installation(s). After you have installed the prerequisite files, return to the MobileTech Server Setup window and select *Next*.
5. In the Welcome window, click *Next*.
6. On the End-User License Agreement page, read and accept the terms of the license agreement and select *Next*.
7. 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 the instance where the Microsoft Dynamics GP database is installed.
    - **SA Password:** Enter the SQL system administrator password.
8. Select *Next*. The ODBC runs a connection test.
9. 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.
10. Select *Next*.
11. 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):** This is the email address that you will use to log into Woodford.
12. Mark the checkbox 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).
13. Click *Next*.
14. 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.
15. Select *Next*.
16. On the Select Installation Folder window, select *Browse* to select the location where MobileTech Server will be installed, or accept the default location C:\Program Files (x86)\Signature\MobileTech\.
17. Select *Next*.
18. On the Installing Signature MobileTech Server page, select *Install*.
19. The Administrator: Windows PowerShell command window opens to run a Resco script.
    Note: 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.
20. Press any key to close the command window.
21. On the Signature MobileTech Server Setup window select *Finish*.

Step 4: Install MobileTech Client

To install the MobileTech Client on a computer, see Install or Upgrade the MobileTech Client (page 25).

Step 5: Set Up MobileTech Admin

After completing the installation steps, you will need to review the Setting up MobileTech (page 25) 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 been 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 select *Process*.

> 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 21).

Step 7: Deploy Any Updated SSRS Reports

If the MobileTech Readme indicates any SSRS Reports have been updated, you will need to deploy these reports. See the Signature Reports Guide for information on deploying a report.

Step 8: Re-Import Any Updated Inspection Reports/Templates in Resco Cloud

If the readme indicates that any of the Inspections have been updated, you will need to re-import these for any changes to be available.

Step 9: Force Sync and Discard Device Changes in Resco Cloud

After performing the upgrade in the Resco Cloud, you will want to run the Force Full Synchronization with the "Force and Discard Device Changes" option. This ensures that any pending device data will be discarded and prevents issues that could occur with the upgraded middle-tier database and Signature.

1. In MobileTech Administration, select *Tools* > *Launch Resco Cloud Dashboard*.
2. Enter the **Email** and **Password** and select *Log in*.
3. In the left navigation, select **Woodford**.
4. In the left navigation under Administration, select **Device Control**.
5. For each user, mark the **Full Sync** checkbox and then select **Force and Discard Device Changes**.
6. Close Woodford.

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

> - **Do not install a version of Resco Cloud that is newer than the indicated version in the Installation Components and Compatibility section of the Readme[10].** Do not install a newer version of Woodford until you are instructed to 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, select *Later*.** 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, select *Settings* and unmark the **Check for updates on startup** checkbox.
- **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 86) (UseMobileAuditBackgroundSync=True), please re-enable the Woodford Auditing settings after importing a new Woodford project.
  - If you are importing an updated project with the same name, you must rename the deactivated project using Properties from the top navigation before importing. Then select *Create New* in the window that displays.
- **Import the MobileTech Localization file before importing the MobileTech Woodford file.** The language file sets how the fields are displayed in the MobileTech Client and throughout the Resco Cloud Dashboard. If this is not imported, you may see a different label for the same field (for example, you may see **Title** instead of **Subject** for the *annotation.subject* field label).
  - If you neglect to import the language file at the global level before importing the project, you will need to import the language file at the project level.
  - If you have customized your current MobileTech-org.lang localization file, we recommend that you export your modified localization file from the Localizations section in Woodford. (Go to Woodford > Localizations. Select English (United States) and select Edit. Select Export.) Open both your current language file and the new language file and update the new file with your customizations, then you can import the updated new file to Resco Cloud by following the steps below.

Importing the MobileTech Localization file:

1. In the left navigation, select **Localizations**.
2. In the Language list, select **English (United States)** and then select *Edit*.
3. Select *Import* and navigate to C:\Program Files (x86)\Signature\MobileTech\Admin\Woodford.
4. Select **MobileTech-org.lang** and select *Open*.
5. In the Woodford Language window, select *Save & Close*.

Resco's platform officially supports Google Chrome. Other recent browsers generally work, but they are not officially supported. For more information, see Resco's Frequently Asked Questions[11]. We've received reports that some Microsoft Edge users experience a blank window when attempting to import the Woodford project.

Import the MobileTech Woodford Project

After you have imported the language file, you must import the MobileTech Woodford project.

1. In MobileTech Administration, select *Tools > Launch Resco Cloud Dashboard*.
2. Enter the **Email** and **Password** and select *Log in*.
3. In the left navigation, select **Woodford**.
4. The Registered User window may display. If it does, enter your contact information in the window and select *Register*.

10. https://wennsoft.atlassian.net/wiki/spaces/mt2025/pages/579142103/Readme+-+September+2025
11. https://docs.resco.net/wiki/Frequently_asked_questions#Which_browsers_are_supported.3F

5. Unmark the option to be notified when Woodford updates are available. In Woodford, select *Settings* and unmark the **Check for updates on startup** checkbox. Click *Save*.
6. In the left navigation, select *App Projects*. (This is the default view.)
7. Select *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 App Projects list, select **MobileTech x-xx-xxx.woodford**.
   Note: If you are re-importing the same project version and are prompted to overwrite the existing deactivated project, select Cancel and then rename the existing deactivated project using Properties in the top navigation. Then import the project and select *Create New* in the window that displays, and continue with the instructions below.
9. Select *Open*.
10. In the Import Project window, select the **Standard Users** project type.
11. Select *Next*.
12. In the **Choose template from gallery** window, select *Next* without selecting a template.
13. Select the **App** drop-down and select *Default*. If this is a new installation, type *Default* in the **New App Name** field.
14. Select *Create* or *Next*.
15. Complete the following fields:
    - **Name:** Accept the default name.
    - **Priority:** Accept the default "0". However, if you have more than one project for the same security role, the one with the higher priority is used.
    - **Custom Version Identifier (Optional):** Leave blank or enter any descriptive text. This information is displayed in the Project Version column of the App Projects grid. You can edit the project properties to update this field if needed.
    - **Roles:** Mark *MobileTech.*
16. Select *Save* or *Create*.
17. An exclamation point icon displays next to the mobile project to indicate the project has not been published.
18. Select the MobileTech mobile project and click *Edit*.
19. In the Navigation bar at the top, verify that the **Publish Version** displays 16.0. If it doesn't, use the drop-down to select this version to avoid sync issues.
20. From the left navigation, select *Branding* and enter your company's email address that should receive support questions. Select *Save*. You may be prompted to verify the email address.
    - If you select *Verify*, an email with a verification code is sent. The code must be entered to save the email address.
    - If you select *Skip*, the email address is saved without the verification.
21. *Publish* the project.

Create the Child Project and Import the MobileTech with Inspections Woodford Project

If you are using Resco Inspections, you must complete this section after you have published the MobileTech Woodford project (above).

With this project as the child project:

- Any customizations added to the MobileTech Woodford (parent) project will be included automatically on the MobileTech with Inspections (child) project. When publishing the customizations on the parent project, select *Publish All* to write the changes to the child project.

- If you customize the child project directly, the inherited object link to the parent project will be broken. Any object in the Inspections project that overrides the base project must be modified directly within the Inspections project; otherwise, the changes won't be visible. If you want to implement something unique in the Inspections project that isn't covered by the parent project (such as branding emails or auditing settings), you can make those changes in the derived Inspections project without disrupting the overall project-level link to the parent project. When you re-publish all, it won't pull those values from the parent project again.

To create the child project and import the Inspections project:

1. While still in Woodford in the Resco Cloud, select the MobileTech project.
   If you just completed the steps above, you will need to click the back button to display the App Projects.
2. Select *Derive* from the top ribbon. This step creates the child project.
3. In the Derive Project window, select the **Standard Users** project type.
4. Select *Next*.
5. Select the **App** drop-down and select *Default*.
6. Select *Next*.
7. Complete the following fields:
   - **Name:** Enter a name for the child project, like “MobileTech Inspections 2025-0-xx” or whatever you prefer to identify this as the Inspections project.
   - **Priority:** Accept the default "0". However, if you have more than one project for the same security role, the one with the higher priority is used.
   - **Custom Version Identifier (Optional):** Leave blank or enter any descriptive text. This information is displayed in the Project Version column in the App Projects grid. You can edit the project properties to update this field if needed.
   - **Roles:** Mark *Inspector.*
     - Do not mark MobileTech, as this is used with the parent MobileTech Woodford project.
     - Do not mark Manager, as this is used with the Inspection Manager (page 93) Woodford project.
8. Select *Create*.
9. Select the child project from the App Project list and click *Import* from the top navigation.
10. Import the **MobileTech with Inspections** project from your installation location.
11. Select *Overwrite*. This will overwrite the blank child project that was created above with the Inspections project that has been set up.
12. Select the child project and from the top navigation, select *Edit*.
13. Publish the project.

You must assign the Inspector Role in MobileTech Admin to any technicians using Inspections (and the optional Job Safety Analysis). See Working with Resco Inspections (optional) (page 109).

Additional Optional Woodford Customizations and Configurations

See Setting up Woodford (optional) (page 83) for information on customizing and configuring entities. For details on using Woodford to customize your application, see the *Resco Mobile CRM Woodford User Guide*[12].

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

Sync the Technicians' Devices

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

Install or Upgrade the MobileTech Client

After installing and setting up MobileTech Admin, you will want to test your settings in the Mobile CRM app (MobileTech Client).

> The MSI (non-Windows Store) version of the Resco Mobile CRM available from the Resco website is no longer compatible with MobileTech. If you currently use the MSI version, you must migrate to the Windows Store version and should plan accordingly before upgrading.

- **Android Devices**: Install the Resco Mobile CRM app from the Google Play Store[13].
- **Apple Devices**: Install the Resco Mobile CRM app from the Apple App Store[14].
- **Windows Devices**: Install the Resco Mobile CRM app from the Microsoft App Store[15]. If you are using the Windows version of MobileTech and SSL, you cannot use a self-signed SSL certificate. You must get a certificate from a valid certification authority.

> As App Stores are increasing their security requirements, HTTPS (with Trusted SSL Certificates) will soon become a requirement across all device types. Therefore, we recommend that you transition your MobileTech environment to use SSL with a trusted certificate.

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.

- The user who logs in 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 29).
- You need to set up MobileTech for each company by completing the procedures that follow.
- You may 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 select *Process*.
- If your technicians need WiFi, and your company typically turns it off overnight and on weekends, you might want to reconsider this practice to ensure they have the necessary access.

13. https://play.google.com/store/apps/details?id=net.resco.mobilecrm
14. https://apps.apple.com/us/app/resco-mobile-crm/id376630523
15. https://www.microsoft.com/store/productId/9WZDNCRDRDSC?ocid=pdpshare

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

Add Resco Cloud User to SQL Server Reporting Services

You will need to add the IIS APPPOOL\RescoCloud user to the SQL Server Reporting Services Home Folder permissions page. For instructions on adding the user, see https://docs.microsoft.com/en-us/sql/reporting-services/install-windows/reporting-services-configuration-manager-native-mode?view=sqlallproducts-allversions. You can filter the instructions to your SQL Server version.

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.

To set up DTC:

1. From the Start menu, select *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 select **Properties**. The Local DTC Properties window is displayed.
4. Select 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 select *Browse* to select a different location. For more information about the options in this window, select the **Learn more about setting these properties** link at the bottom of the window.
8. Select *OK*.
9. In the Component Services window, in the left pane, select **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. Select *OK*.

Setup Password Complexity and Lockout Policy

While you can manually add the technicians' passwords in MobileTech Admin (see Add a MobileTech User (page 71)) or in Resco's Admin Console (see Set Technician Passwords with Admin Console (optional) (page 91)), you can use the Update Password Policy window to set up the complexity, password expiration, as well as lockout mode. In MobileTech Admin, select Tools > Update Password Policy.

- When MobileTech users and administrators update their passwords, the password complexity is enforced.
- The password expiration applies only to MobileTech users, not to MobileTech administrators.
- If you've previously set up password complexity and lockout policy using Regex, those values will default into this window.
- If you do not have a password complexity set up, the Update Password Policy window automatically displays after these events:
-
    - Add Company Objects
    - Add/Update Organization Database
    - Change Administrator Password
    - Upgrade Resco Server

We recommend enabling all requirements and setting the minimum password length to 8 characters.

Setting Up Password Complexity

A password complexity policy is designed to deter brute force attacks by increasing the number of possible passwords by enforcing the use of strong passwords such as requiring digits, upper case letters, special characters, and password length. When the passwords expire, a prompt is displayed when the technician attempts to sync or sign in to their device and they can update the password at that time.

1. In MobileTech Admin, go to Tools > Update Password Policy. If you have an existing password policy set up, the checkboxes with be automatically marked.
2. Choose from the following complexity options by marking the applicable check box(es).
    - **Require at least one number.** 0-9
    - **Require at least one upper case letter.** A-Z
    - **Require at least one special character.** (?=.*[^0-9A-Za-z])
3. Set the **Minimum password length**. This setting determines the least number of characters that can make up a user account. If set to 0, a password can be any number of characters.

Setting Up the Lockout Mode

Set up your password lockout policy to indicate how many x failed login attempts, as well as how many minutes a user's account is locked.

Enter the Lockout Mode options:

1. **Lockout Attempts**: Enter the value of how many unsuccessful logins a user can attempt before their account is locked. The default value is 3 attempts.
2. **Lockout Duration (in minutes)**: Enter the value that indicates how many minutes the user's account is locked before they can try to log in. You can also manually unlock a user's account from the MobileTech Admin Users window by selecting the user and then selecting the Unlock button. The default value is 10 minutes.

Setting Up the Technician Password Expiration Policy

Set up when you'd like all technician passwords to expire, which would require each technician to set up a new password that conforms to your password complexity. To check the current value, navigate to User via the Resco Cloud Dashboard Admin Console. See Set Technician Passwords with Admin Console (optional) (page 91) for more information.

1. Mark **Overwrite current value**.
2. Select **Password Expiration In** value.
    - **Never**: The current password never expires. *Never* is the default selection.
    - **Next Logon**: The user is prompted to change their password the next time they log into MobileTech. After the password has been changed, the password expiration is set to "Never", which means users will not be prompted automatically to change their password again. You can come back at a later time and change the Password Expiration value to something other than "Never" (or "Next Logon") if you want to have an expiration after x days.
    - **30 Days**: Every 30 days/1 month, users are prompted to reset their password when logging into MobileTech.
    - **90 Days**: Every 90 days/3 months, users are prompted to reset their password when logging into MobileTech.
    - **180 Days**: Every 180 days/6 months, users are prompted to reset their password when logging into MobileTech.
    - **1 Year**: Every 365 days/12 months, users are prompted to reset their password when logging into MobileTech.
3. Select *Update* to save the changes in the Update Password Policy window.

Increase the Maximum Size of the MobileTech Event Log (Optional)

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.

To increase the MobileTech Event Log maximum size:

1. Select *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 select **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. Select *OK*.

Launching MobileTech Admin

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:** Select the authentication mode. You must have a valid SQL Server login 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 of the system administrator (sa).

    - **Password:** Enter the password for the system administrator.
3. Select *Connect*.
4. If multiple companies are installed, the MobileTech Administration Login page is displayed again. In the **Company** field, select a company and select *Connect*. The active company is displayed at the bottom left of the MobileTech Administration page.
5. Enter the email address, password, and other information for the administrator, and then select *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, select *Tools* > *Create MobileTech Objects*. You must install database objects for each company. For more information, see Set Up MobileTech Options (page 29).
7. Select *Process*.
8. Continue setting up MobileTech.

Create a Cleanup Job for the Middle-Tier Database

Occasionally, when a service call, service appointment, or job appointment is created in the host system but completed on a mobile device, records that are related to the call or appointment do not get removed from the middle-tier database when the call or appointment 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 are 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.
- Service appointments that are before or after 14 days from the current date (based on the task date) or within 14 days with a status of CLOSED or RE-ASSIGNED.
- Job appointments that are before or after 14 days from the current date (based on the start date).

> If more than 450 service calls and/or appointments are completed per day, we recommend that you contact WennSoft Support.

This job is automatically set up when you create a new middle-tier database. The job will automatically 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.

To create a cleanup job for the middle-tier database:

1. In MobileTech Administration, select *Tools* > *Create Middle Tier Database Clean Up Job*. The Create Cleanup Job page is displayed.
   Note: You must be a member of the SQL Server SysAdmin role to open this page.
2. Select *Close* after the cleanup job is created.

Set Up MobileTech Options

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

1. In MobileTech Administration, select *Setup Options*.

2. On the Setup Options window, use the **Search** field to find a specific setup option name. Use the *Clear* button to remove the text from the Search field.
3. You can 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

Setting	Description
DataSource	The SQL Server name and instance that was specified during login. 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**.
LogError	Determines if MobileTech errors are emailed to the AdminEmailAddress as well as saved in the Event Log. The default value is set to **Event Log and Email Admin**, errors are saved to the event log and emailed to the AdminEmailAddress. If set to **Event Log Only**, the errors are saved only to the Event Log and no emails are sent.
DefaultDocumentCategory	This read-only setting shows the Default Storage Location selected in Signature's Document Storage Setup window. • Copy File • Attach File • Copy To Database: If your Signature version is earlier than 2024, this option is the default. • Cloud Storage: New with Signature 2024, users have the option to use Microsoft Azure Cloud storage (either WennSoft-hosted or self-hosted).

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 or task response 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.
IncludeAllCallNotesWithHistory	Determines if all service call notes will be included when historical records are requested. The default value is **True**. The notes display on the History tab in the Other Notes section. The notes are pulled from the SV000805 table. The Other Notes section displays up to 100,000 characters. If the combined notes in the Other Notes section are longer than the allowed 100,000 character length, the displayed notes are appended with "..." to indicate to the user that the message is too long to display.

Email Settings

After you save the Email Settings, select the Send Test Email button to test your SMTP server settings. If successful, a "Test Email sent to Admin Email Address" message displays. If unsuccessful, an error message displays the system error(s).

The email layout is as follows:

- **From**: if UseSMTPAuthentication then from SMTP username, otherwise AdminEmailAddress
- **To**: AdminEmailAddress
- **Subject**: MobileTech Admin Test Email
- **Body**: You have requested to send this test email from MobileTech Admin.

Setting	Description
EmailSMTPServer	Enter the SMTP email server address. (Example: smtp.office365.com)
EmailSMTPServerPort	Enter the port number used by the email server.

Setting	Description
EmailSMTPEnableSSL	Determines if a secure socket layer (SSL) is used by the email server. The default value is **True**.
UseSMTPAuthentication	Determines whether a username and password are required for sending an email. The default value is **True**.
SMTPAuthenticationMode	Determines how a user is authenticated to send emails via SMTP. The default value is **Basic**. • **Basic** (default): Requires username and password. • **Azure OAuth**: Requires username and token. See Setting Up Azure OAuth (page 32) below.
SMTPUsername	The username that is used to send report email notifications. This is required if **UseSMTPAuthentication** = **True**.
SMTPPassword	The password is used to send report email notifications. This is enabled and required if **UseSMTPAuthentication** is **True** and the **SMTPAuthenticationMode** is **Basic**. If you are using Gmail with two-factor authentication and **ReportEmailSMTPServer** is set to *smtp.gmail.com*, you will need to create a Google App Password. See How to create app passwords[16] in Google's Knowledge Center. (external link)
The following options are enabled and required if **UseSMTPAuthentication** is **True** and the **SMTPAuthenticationMode** is **Azure OAuth**.	
OAuthTenantId	A unique identifier for an Azure Active Directory (AD) tenant that identifies the directory where the application is registered.
OAuthClientId	A unique identifier for an application registered in Azure Active Directory (AD) that identifies the application when requesting tokens from Azure AD.
OAuthClientSecret	A secret string that the application uses to prove its identity when requesting tokens from Azure AD. It is used with the ClientId to authenticate the application.

Setting Up Azure OAuth

Microsoft is deprecating SMTP Basic Auth in September 2025. This MobileTech update includes new setup options so emails may be sent from MobileTech using OAuth SMTP via Outlook/Office 365.

16. https://knowledge.workspace.google.com/kb/how-to-create-app-passwords-000009237

Basic auth is a legacy authentication method that sends usernames and passwords in plain text over the network. This makes it vulnerable to credential theft, phishing, and brute force attacks. For more information about why this change is occurring, including FAQs, see https://techcommunity.microsoft.com/blog/exchange/exchange-online-to-retire-basic-auth-for-client-submission-smtp-auth/4114750.

Step 1: Register MobileTech with the Microsoft Identity Platform

Complete the steps from Microsoft's Quickstart: Register an application in Microsoft Entra ID[17] web page. This will provide the Tenant ID, Application Client ID, and Client Secret information required in the Email Setup Options in MobileTech Administration to authenticate sending emails.

Step 2: Set Up Microsoft Graph Permissions

After registering MobileTech as an application, you will need to add the following permissions to the Microsoft Graph API. For more information, see Add permissions to access Microsoft Graph[18].

Permission Name	Admin Consent Request
Mail.ReadWrite	Yes
Mail.Send	Yes
offline_access	No
User.Read.All	Yes

17. https://learn.microsoft.com/en-us/entra/identity-platform/quickstart-register-app?tabs=client-secret%2Cexpose-a-web-api
18. https://learn.microsoft.com/en-us/entra/identity-platform/quickstart-configure-app-access-web-apis#add-permissions-to-access-microsoft-graph

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**: Email 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**: Email 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 new contacts and customers' email addresses to send them documents. This value applies only to external reports and documents, such as field invoices and the Call Summary report. **Note**: This option allows technicians the ability to add a contact on-the-fly.

<table>
<tr><th>Setting</th><th>Description</th></tr>
<tr><td>InspectionReportEmailMode</td><td>Determines when MobileTech inspection reports are automatically emailed. Emails are sent only if Inspection Email Options for the given inspection template and SMTP settings are set up in Inspection Email Options. Technicians will only receive the reports if the Email Technician checkbox is marked in Inspection Email Options for the given inspection template. See Set Up Email Options for an Inspection Report (optional) (page 118).

Do not send inspection report emails: This is the default value. When selected, the inspection report is not automatically sent. The technician can manually send the report from the device.
Send when inspection report is first created: Sends the inspection report when the technician syncs after creating the report. The report is sent automatically to the designated recipients in Inspection Email Options.
Selected or entered by technician: Sends the inspection report(s) related to an appointment when the appointment is completed to the designated recipients in Inspection Email Options. The technician can also select one or more Contact email addresses to send the inspection report(s). The technician can also enter new contacts and customers' email addresses. Note: This option allows technicians the ability to add a contact on-the-fly.
</td></tr>
<tr><td>ReportEmailAttachmentMode</td><td>Determines if multiple attachments are included in one email upon appointment completion. This option is enabled if InspectionReportEmailMode is set to "Selected or entered by Technician".

Send individual emails per report attachment: Attaches only one inspection report per email when the appointment is completed. If multiple inspection reports exist for the appointment, an email is sent for each inspection report. This is the default value.
Combine inspection attachments to one email: Attaches all inspection reports related to the appointment when the appointment is completed.
Combine all report attachments into one email: Attaches all inspection reports and the call, appointment, and/or job appointment summary reports related to the appointment when the appointment is completed. This option does not include field invoices. Field invoices will be sent as a separate attachment.

To be able to attach the inspection and summary reports to one email, both ReportEmailMode and InspectionReportEmailMode need to be set to "Selected or entered by Technician."</td></tr>
</table>

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
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.
GenerateServiceSummaryReport	Determines if the Call or Service Appointment Summary Reports are generated when a service appointment is completed. The default value is **True**. If set to **False**: • The Call Summary Report or the Service Appointment Summary Report is not generated when a service appointment is completed. • The list of emails to select to receive the report will not display. • The Technician and Customer signature buttons will not show on the Summary tab.
GenerateJobSummaryReport	Determines if the Job Summary Report is generated when a job appointment is completed. The default value is **True**. If set to **False**: • The Job Appointment Summary Report is not generated when a job appointment is completed. • The list of emails to select to receive the report will not display. • The Technician and Customer signature buttons will not show on the Summary tab.

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 49), we recommend that you do not use the same status for both. ⚠ *AutoStatusUpdate* and *TimeLogStatusUpdate* in Time Log Settings (page 44) cannot have the same value.
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 data via the Middle Tier database (utilizing mobile data). If **False**, users will only access data on their devices, not from the Middle Tier. The default value is **True**. See Set the Fetch Limit (optional) (page 92) for information on setting the number of records that the SERVER MODE fetches at a time on the New Service Call form and Job List 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.

Setting	Description
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 helper 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**.
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.

Setting	Description
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. 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 select **Sync**. For more information, see Event-based Syncing[19] in the MobileTech Help. To use event-based syncing after adding a PO line, you will also need to update UsePOEventBasedSync to True in Purchase Order Settings. Users will be prompted to sync their device after a: • A service call is created. • An appointment is created or completed. • A timesheet report is requested. • A legacy job safety audit (JSA) report is requested. • A piece of equipment is created. • A payment has been applied to a field invoice. • A purchase order is created.
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 (optional) (page 86) 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 (optional) (page 86) for more information.

19. https://wennsoft.atlassian.net/wiki/spaces/mt2025/pages/579146611/Synchronization#event

Setting	Description
UseAppointmentStatusBackgroundSync	Determines if a background sync is performed when the appointment status is changed manually or automatically on the device. This option requires an internet connection and applies to all appointment types. The default value is **False**. With this option set to **True**, only the appointment status is pushed during the background sync. Changes are not pushed if: • Appointment only exists in MobileTech (new appointment not synced yet) • Appointment in Signature already has status “RE-ASSIGN” or “COMPLETE” • Appointment in Signature has been assigned to another tech • MobileTech Appointment Status is “DEFAULT” or “COMPLETE”
IncludeLocationWithAppointmentStatusSync	Determines if latitude and longitude are included in the automatic background sync. This option applies to job and service appointments. The default value is **False**. This option is enabled when UseAppointmentStatusBackgroundSync is set to **True**. With both options set to **True**, only the appointment status and GPS data are pushed during the background sync.
AllowPreviousWeekEntries	Allows technicians to create and update time entries (labor, expense, travel) for the previous work week. The default value is **True**. The work week is determined by the Week Ending Date have set up in Signature. • **True**: Technicians can create and edit time entries for the previous week. • **False**: Technicians can only enter time entries for the current week. If you are using Manager Approval for time sheets and the manager rejects an entry from the previous week, the technician can not update the entry.

Setting	Description
UseSyncPrompt	To help prevent issues with users having multiple devices, a sync prompt automatically displays on the device if the user hasn't synchronized their device after the SyncInterval value (hours). You can also set the CheckInterval (minutes) that determines how often MobileTech checks to see if the SyncInterval has been reached. Once the technician syncs the device, the Sync Interval resets. If the technician selects Cancel on a sync reminder prompt, this is logged in the JSBridge file on the device. The log file includes the date and time that Cancel was selected. The log file can be sent and you can see if the technician was not syncing when prompted. The default value is **True**.
SyncInterval	This value determines how frequently (in hours) the technicians sync their devices. The default value is **4 Hours**. This option is enabled if UseSyncPrompt is set to True.
CheckInterval	This value determines how frequently (in minutes) MobileTech checks if the SyncInterval has been reached. The default value is **15 minutes**. This option is enabled if UseSyncPrompt is set to True.
ShowRelatedAppointmentsOnCompletion	Allows technicians to view related appointments for the service call or job, regardless of the assigned technician. Technicians can also access related appointments from the Appointment form on the Related tab. The default value is **True**. See View Related Appointments[20]. • **True**: The Related Appointments button is displayed on the Completion form. • **False**: Technicians do not see the Related Appointments button on the Completion form.

20. https://wennsoft.atlassian.net/wiki/spaces/mt2025/pages/579147795/View+Related+Appointments

Job Settings

Setting	Description
ShowJobList	Determines if the Job icon displays on the Home screen. Technicians can select this to view the list of jobs on their device. The default value is True. See Create a Job Appointment[21]. • **True**: The Job icon displays on the Home screen. • **False**: The Job icon does not display on the Home screen.
IncludeAllActiveJobs	Determines if all active jobs from Signature display in the Job List. The default value is True. • **True**: All active jobs from Signature display. • **False**: Only jobs with active appointments in MobileTech's middle-tier display.
ServerJobCount	Determines the number of job records that are displayed when job data is requested from the server. The default value is **3**.
AllowJobTimeEntries	Determines if technicians can create time entries for a job instead of the job appointment. The default value is True. • **True**: Technicians can create a time entry for a job. • **False**: Technicians can only create a time entry for a job appointment. **Note:** Manager Approval is not supported for this feature.
AllowCreateJobAppointments	Determines if technicians can create job appointments. The default value is **True**.

21. https://wennsoft.atlassian.net/wiki/spaces/mt2025/pages/579148935/Create+a+Job+Appointment

Service Call Settings

Settings	Description
SetAppointmentDetailsOnNewCall	Allows technicians to set the appointment details from the New Call form. Appointment details include start date, estimated hours, description, and status. The default value is **True**. • **True**: The Appointment Details fields display on the New Service Call form. • **False**: The Appointment Detail fields to display on the New Service Call form • If *AutoStatusUpdate* is set, this will be the status that defaults in this field. This setup option is in the current Mobile Device Global Settings section. • If *TimeLogStatusUpdate* is set, while this status is available in the status list, when selected, technicians will be prompted to synchronize their device. This status can only be selected when the technician is ready to time into the appointment, not when creating the appointment. See Time Log Settings (page 44).
SetCallerDetailsOnNewCall	Determines if the caller detail fields are enabled on the New Call form. The caller detail fields include Caller Name, Caller Email, and Caller Phone. The default value is **False**. • **True**: The Caller Detail fields display on the New Service Call form. • **False**: The Caller Detail fields to display on the New Service Call form.
CreateNewCallForBillOnlyLocations	Determines if technicians can create new service calls for locations marked as Bill Only in Service Management. The default value is **False**, which means the Bill Only locations do not appear in the lookups in MobileTech and technicians are not able to create new service calls for Bill Only locations.
DefaultCallType	Determines the default call type for new service calls. The default value is <none>. Use the drop-down to select from the list of the available call types. (MCC is not included in the list.)
DefaultProblemType	Determines the default problem type for new service calls. The default value is <none>. Select the default problem type from the drop-down list of all problem types.

Settings	Description
ShowRelatedAppointmentsOnCompletion	Allows technicians to view related appointments for the service call or job, regardless of the assigned technician. Technicians can also access related appointments from the Appointment form on the Related tab. The default value is **True**. See View Related Appointments[22]. • **True**: The Related Appointments button is displayed on the Completion form. • **False**: Technicians do not see the Related Appointments button on the Completion form.
AllowRescheduleAppointments	Determines if technicians can change the start date and time of existing service call appointments and technician activities. The default value is **True**. • **True**: Technicians are able to change the start date and time. • **False**: Technicians are not able to change the start date and time. The Start Date field is disabled on the Service Appointment and Technician Activity forms. • This setting does not apply to creating new service appointments or technician activities. • This setting also does not apply job appointments. The job appointment start date and time cannot be changed.

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**.

22. https://wennsoft.atlassian.net/wiki/spaces/mt2025/pages/579147795/View+Related+Appointments

Setting	Description
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.
RoundInitialTimeInOut	Determines if rounding is applied to the **initial** Time In and Out values instead of using actual time. The default value is **False.** • **False**: Displays the **actual** time value when entering the initial values. When a user times in initially, the actual time in and time out values are used. If they edit the values from the time log form, then the values will be rounded based on the rounding interval that is set in the *TimeLogRoundingInterval* setting. • **True**: Displays the **rounded** time value when entering the initial values. If you have the *TimeLogRoundingInterval* set to round by 5, and the user is timing in at 4:07, the time displayed is 4:05. If timing out at 4:32, the time displayed is 4:30.
AllowDeleteTimeIn	Determines if technicians are able to delete a time-in for a job/service appointment and technician activities. The default value is **True**. Select **False** if you do not want your technicians to be able to delete a time-in from their mobile device. See Delete Time-In[23] in MobileTech Help for more information.

23. https://wennsoft.atlassian.net/wiki/spaces/mt2025/pages/579148149/Delete+Time-In

Setting	Description
TimeLogStatusUpdate	Select 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 37) cannot have the same value.
UseTimeLogBackgroundSync	Determines if the technician's coordinates are automatically uploaded to the audit_timelog table with a background sync to the middle-tier anytime they time in, time out, or delete a time-in. The default value is **True**. Select **False** if you do want the coordinates automatically uploaded to the audit_timelog table. This option is disabled if UseTimeLog is set to False. If you are using Travel Time Log, the coordinates are automatically uploaded when travel time begins, pauses, resumes, ends, or is deleted. See Travel Settings (page 60). To capture the data, the device must be connected to the server and have GPS Location turned on. If there isn't a connection or errors occur, an error message is saved to the JSBridge log file.
UseTravelTimeLog	Determines whether technicians can time in and out from the client device for travel time to be calculated automatically by the system to the labor or travel cost code indicated below as the *DefaultCostCodeTravelTimeLog*. The default value is **False**. Select **True** to allow technicians to use the Travel Time feature. If **False**, the remaining settings in this section are not available.
DefaultBeginTravelStatus	Select the appointment status to default for an appointment when the technician selects Begin Travel. The default value is blank. If no value is set, the appointment status is not changed on begin travel.
DefaultEndTravelStatus	Select the appointment status to default for an appointment when the technician selects End Travel. The default value is blank. If no value is set, the appointment status is not changed on end travel.

Setting	Description
DefaultCostCodeTravelTimeLog	Select the cost code value used when a technician ends travel to an appointment. This also sets the time entry cost type to LABOR or TRAVEL for service appointments or technician activities. If this a job appointment, then only a LABOR cost code is used based on the job appointment details. The default value is blank. If no value is set, the technician can manually select the pay code in the popup window after selecting End Travel. If the user has a different pay cost code set for their default, that pay code overrides the cost code set here. To default the billed/unbilled pay code, you can set this up in the Travel Settings (page 60) section in MobileTech Options.
MinimumTravelMileage	Enter the minimum allowed mileage for travel time logs. A valid value is anything greater than or equal to 1. The default value is **1**.
MinimumTravelTime	Enter the minimum allowed time (minutes) for travel time logs. A valid value is anything greater than or equal to 1. The default value is **1**.
RequireTravelforCompletion	Determines if technicians must enter travel before gaining access to the appointment completion form.
AutoTimeIn	Determines if the technician will be automatically timed in to an appointment after ending travel. The default value is **False**, which means the technician will have to manually time into the appointment. Select **True** to automatically time the technician in to the appointment.

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 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.
- Field invoicing is not available for MC and MCC calls or if the service call originated from a quote (and has an Invoice_Type of 1 or 3).
- 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.
UseFieldInvoicePreview	Determines whether technicians can preview field invoices before they are generated. The default value is **False**. If **True** and UseFieldInvoiceSignature = **True**. The technician is prompted to either use the Summary Signature or to capture a signature for the Field Invoice Report. If **False** and UseFieldInvoiceSignature = **True**, the Summary signature is used for the Field Invoice Report, without prompting the technician to obtain the invoice signature.
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**.

Setting	Description
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**. If **True**, depending on the UseFieldInvoicePreview setting, the Field Invoice Report may use the Summary Signature or the technician may be prompted to collect a new signature for the Field Invoice Report. A customer signature captured from the Report tab is only attached to the Field Invoice Report. The signature validation for the Field Invoice Report uses the Signature Settings CustomerSignatureValidationLevel option in MobileTech Admin's Setup Options. See Signature Settings (page 63).
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 Analysis (Resco Inspections), see Enable Job Safety Analysis (optional) (page 110).
- Job Safety Audit (JSA) information in the host system, see Set Up Job Safety Audit (JSA) Information (page 103).

If any JSA task responses are marked as required in Service Management, the Legacy JSA Report can not be requested until all required responses are entered.

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. The JSA is used only for service appointments created after this setting to **True**. 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. This option applies only to the legacy Job Safety Tasks option. This does not affect Job Safety Analysis (Resco Inspections).

Setting	Description
JobSafetyStartStatus	Select the service appointment status that is used to start the JSA process. When a technician selects this service appointment status, the **Job Safety** tab opens automatically so the technician can complete JSA tasks. If the 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. This feature is for service appointments only.
JobSafetyUnsafeStatus	The appointment status 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. This setup option is also used with the Job Safety Analysis report with job appointments. The other setup options are only for service appointments.
JobSafetyValidationLevelService	The level of requirement for completing the JSA report before starting work on service appointment tasks. The default value is **REQUIRED**. • **REQUIRED:** The report must be completed to complete a service appointment. • **OPTIONAL:** The report does not have to be completed to complete a service appointment.
JobSafetyValidationLevelJobCost	The level of requirement for completing the JSA report before starting work on job appointment tasks. The default value is **REQUIRED**. • **REQUIRED:** The report must be completed to complete a job appointment.**:** • **OPTIONAL:** The report does not have to be completed to complete a job 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.

Setting	Description
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.
UseReplacementParts	Determines whether the Replacement Parts tab is displayed for equipment assigned to the service call on the Appointment Completion form for service appointments. The default value is **False**. If set to **True**, the Replacement Parts tab is displayed for non-MC/MCC calls. If you want this to display for either or both of these calls you can edit the **Complete - Service Appointment** form in Woodford. See Enable Replacement Parts Tab for All Calls (Optional) (page 98). For information on using the Replacement Parts tab, see Create a Replacement Parts Inventory Transaction[24]. Replacement parts for equipment are added in the Replacement Parts window in Signature. See Assigning Replacement Parts to Equipment[25].
AllowCreateSublocations	Determines if a technician can create sublocations from their device. The default value is **False**. Set to True to allow technicians the ability to create unique (for the location) sublocations for equipment. With this set to True, technicians can also edit the description and barcode (if enabled) for an existing sublocation. See Create or Change an Equipment Record[26]. The AllowCreateSublocations option is enabled if Use Validation for Sublocations is marked in Service Management Service Options. (Microsoft Dynamics GP > Tools > Setup > Service Management > Module Setup > Setup Options).

24. https://wennsoft.atlassian.net/wiki/spaces/mt2025/pages/579148008/Create+a+Replacement+Parts+Inventory+Transaction
25. https://wennsoft.atlassian.net/wiki/spaces/sig2025/pages/595829806/Assigning+Replacement+Parts+to+Equipment
26. https://wennsoft.atlassian.net/wiki/spaces/mt2025/pages/579149239/Create+or+Change+an+Equipment+Record

Task Settings

- If a task response is marked as required in Service Management, the task cannot be completed until the response is entered.
- A service call can remain open with Task Completion set to Required if a second appointment is created for the service call prior to attempting to complete the first appointment.

Setting	Description
DefaultTaskStatus	The default task status that is used 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**. • **OPTIONAL:** Appointments can be completed regardless of the status of the appointment tasks. When completing the task, a check is performed for required task responses. Required responses must have a value. • **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**.

Setting	Description
UseTaskMaterials	Determines whether task materials are displayed for tasks and task hierarchies for service calls. The default value is **False**. For information on using task materials in MobileTech, see Create a Task Materials Inventory Transaction[27]. Materials are assigned to a task in Signature. See Assigning Materials to a Task[28].

UseEquipmentAssignmentForMCC	Determines if technicians can add equipment to maintenance contract computer-generated (MCC) calls and have the corresponding equipment type tasks added to the call. The default value is **False**.
	
	To use the new functionality on the device, with UseEquipmentAssignmentforMCC set to **True** and the service call's call type is MCC when assigning equipment to the call or creating new equipment:
	• If the equipment type is NOT populated, the DEFAULT task will be created.
	• If the equipment type is populated:
	    • If the equipment type has a gptasklistid, and the task list has records in the master tables, the related tasks, subtasks, and responses will be created instead of the DEFAULT task.
	    • If the equipment type does not have a gptasklistid, the DEFAULT task will be created.
	
	Notes:
	• If the technician is creating a new piece of equipment and the setup option AllowModifyNewEquipmentID = False, the gpequipmentid on the task, task response, and subtask are not updated from PENDING until the next sync.
	• If the user does not sync after assigning the equipment to the service call, the user can unassign the equipment, and all related tasks, task responses, and sub-tasks are deleted.
	• The default task status assigned to any created task will be from the setup option **DefaultTaskStatus**.

27. https://wennsoft.atlassian.net/wiki/spaces/mt2025/pages/579147957/Create+a+Task+Materials+Inventory+Transaction
28. https://wennsoft.atlassian.net/wiki/spaces/sig2025/pages/595832082/Assigning+Materials+to+a+Task

<table>
<tr><th>Setting</th><th>Description</th></tr>
<tr><td>UseEquipmentAssignmentForMC</td><td>
Determines if technicians can add equipment to maintenance contract (MC) calls and have the corresponding equipment type tasks added to the call. The default value is False.
To use the new functionality on the device, with UseEquipmentAssignmentforMC set to True and the service call’s call type is MC when assigning equipment to the call or creating new equipment:

If the equipment type is NOT populated, the DEFAULT task will be created.
If the equipment type is populated:

If the equipment type has a gptasklistid, and the task list has records in the master tables, the related tasks, subtasks, and responses will be created instead of the DEFAULT task.
If the equipment type does not have a gptasklistid, the DEFAULT task will be created.

Notes:

If the technician is creating a new piece of equipment and the setup option AllowModifyNewEquipmentID = False, the gpequipmentid on the task, task response, and subtask are not updated from PENDING until the next sync.
If the user does not sync after assigning the equipment to the service call, the user can unassign the equipment, and all related tasks, task responses, and sub-tasks are deleted.
The default task status assigned to any created task will be from the setup option DefaultTaskStatus.

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

Setting	Description

UseEquipmentAssignmentForNonMC	Determines if technicians can add equipment to non-MCC and non-MC calls and have the corresponding equipment type tasks added to the call. The default value is **False**.
	
	To use the new functionality on the device, with UseEquipmentAssignmentforNonMC set to **True** and the service call's call type is not MCC or MC when assigning equipment to the call or creating new equipment:
	• If the equipment type is NOT populated, the DEFAULT task will be created.
	• If the equipment type is populated:
	  • If the equipment type has a gptasklistid, and the task list has records in the master tables, the related tasks, subtasks, and responses will be created instead of the DEFAULT task.
	  • If the equipment type does not have a gptasklistid, the DEFAULT task will be created.
	
	Notes:
	• If the technician is creating a new piece of equipment and the setup option AllowModifyNewEquipmentID = False, the gpequipmentid on the task, task response, and subtask are not updated from PENDING until the next sync.
	• If the user does not sync after assigning the equipment to the service call, the user can unassign the equipment, and all related tasks, task responses, and sub-tasks are deleted.
	• The default task status assigned to any created task will be from the setup option **DefaultTaskStatus**.

Purchase Order Settings

These settings apply only if you use purchase orders.

Setting	Description
UsePurchaseOrderService	Determines whether the **PO Line** tab is available when completing service appointments. Technicians can use that tab to enter purchase orders. The default value is **True**.

Setting	Description
UsePurchaseOrderJobCost	Determines whether the **PO Line** tab is available when completing job appointments. Technicians can use that tab to enter purchase orders. The default value is **True**. This option is enabled when users are on Signature 2022 (18.05b07) or higher.
UsePONonInventoryItems	Determines whether non-inventory items can be entered on purchase order lines. The default setting is **True**. To allow non-inventory items to be added when completing appointments, see Inventory Settings (page 61).
PurchaseOrderValidationLevelService	The level of requirement for entering purchase orders before completing a service 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.

Setting	Description

DefaultSite	Determines the default inventory site to use when technicians create purchase orders for non-inventoried items. 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 the technician is not assigned to this site in Service Management but is assigned to only one (different) site, their assigned site will default to the Site field.
	• If the technician has more than one site assigned:
	    • The technician will need to select the site.
	    • If the technician is assigned to the default site set up in Purchase Order settings, that site will default to the PO Line.

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**.
UsePOEventBasedSync	Determines if event-based syncing is used to sync to the host after a purchase order line is created. The default value is **False**. If set to **True**, this option also requires that UseEventBasedSync is set to True.This option also requires that UseEventBasedSync is set to True in Mobile Device Global Settings (page 37).

Resolution Settings

These settings apply only to service appointments.

Setting	Description
UseResolution	Determines whether the **Resolution** tab is displayed when an appointment is completed. The default value is **True** and cannot be changed.

Setting	Description
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. The default value is **False**. • 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. When the appointment is completed, and the device is synched, if UseAppointmentResolutionNote = false then two note entities are created. These notes are available in Signature on the service call resolution note and now added to the appointment note.
JobAppointmentAttachmentLocation	Determines where the Job Appointment Summary Report and Inspection Report attachments are stored in Signature, on the job, or the cost code. The default value is **Cost Code**. • **Job:** Saves the reports at the job level. • **Cost Code:** Saves the reports on the cost code assigned to the job.

Labor Settings

Setting	Description
UseLabor	Determines whether **Labor** is an entry-type option in Time Entry when an appointment is being completed. When set to True, a Time Entries tab is added to the Technician Activities form. The default value is **True**. If **False**, the remaining settings in this section are not available.
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 the previous week total hours, depending on the drop-down selection. • **Appointment Entry header:** Displays the total appointment hours.
RequireLaborForTechnicianActivities	Determines if technicians are required to enter a labor transaction before completing a technician activity. The default value is set to **True**. If **False**, the technician can complete the technician activity without entering a labor transaction.

Travel Settings

Notes

- In the current release, extended pricing is not supported for travel and expense transactions through Time Entry.
- The travel pay code defaults into the user's device when using Travel Time In, based on the selected DefaultCostCodeTravelTimeLog setting. See Time Log Settings (page 44).

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.
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**.
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.

Setting	Description
UseNonInventoryItems	Determines whether non-inventory items can be entered when completing appointments. The default setting is **True**. If you use non-inventory items as task materials and **UseTaskMaterials** = **True**, you should set this option to **True**. To allow non-inventory items to be added to purchase order lines, see Purchase Order Settings (page 55).
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**.
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 select the **Load Data** tab, select your technicians, mark **Sync Lookups**, and then select *Import*. The calculation used is *Quantity on Hand - Quantity Allocated per item in Microsoft Dynamics GP - Quantity in the MobileTech Inventory holding table (WS20002).*
AllowNegativeSiteQty	Determines if site inventory is displayed when there is a zero or negative quantity available. The default value is **True**. This option is enabled when ShowInventorySiteQtyAvailable is set to True.

Auto Open Form Settings

When a technician selects a list tab, if the list has no items, you have the option to have the form to create that item display automatically.

The form auto-open happens the first time you navigate to the corresponding tab within the same instance of the Appointment Completion form.

For example, from the Appointment Completion form, you select the Inventory tab. The Inventory form automatically opens where you can add the new inventory item. You close the Inventory form without creating a new item (the inventory list remains empty). You click a different tab. While still in the same instance of the Appointment Completion form, when you click the Inventory tab again, the empty Inventory list displays. You would have to select the Add icon to open the inventory form.

The functionality has been added to the following lists. By default, this has been enabled for the Inventory, Purchase Order Detail, and Time Entry (from the Appointment Completion form) lists.

List Name	Default Value
AutoOpenAdditionalWorkForm	Automatically open a new form if the technician navigates to an empty Additional Work list. The default value is **False**.
AutoOpenAttachmentForm	Automatically open a new form if the technician navigates to an empty Attachment list. This does not include Task Attachments. The default value is **False**.
AutoOpenChangeOrderForm	Automatically open a new form if the technician navigates to an empty Change Order list. The default value is **False**.
AutoOpenChangeOrderDetailForm	Automatically open a new form if the technician navigates to an empty Change Order Detail list. The default value is **False**.
AutoOpenInventoryForm	Automatically open a new form if the technician navigates to an empty Inventory list. The default value is **True**.
AutoOpenMeterReadingForm	Automatically open a new form if the technician navigates to an empty Meter Reading list. The default value is **False**.
AutoOpenNoteForm	Automatically open a new form if the technician navigates to an empty Note list. The default value is **False**.
AutoOpenPoDetailForm	Automatically open a new form if the technician navigates to an empty Purchase Order Line list. The default value is **True**.
AutoOpenRefrigerantForm	Automatically open a new form if the technician navigates to an empty Refrigerant list. The default value is **False**.
AutoOpenTimeEntries	Automatically open a new form if the technician navigates to an empty Time Entries list from the Appointment Completion form. The default value is **True**.

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.
TimeSheetSignoffText	Enter text that displays on the Time Sheet Report sign-off form and on the Timesheet Report. The text is limited to 4000 characters. This is an optional setup. If left blank, nothing displays.

XOi Integration

XOi equips field technicians with wearable technology systems, or the Vision Telepresence Client app for Android and iOS devices, that capture and share information. The XOi Integration section only displays if you have a valid XOi registration.

- Only one UseXOi option can be set to true. An error message displays if you attempt to set both options to True.

- If you have any customers who do not allow the use of XOi onsite, you can disable XOi Deep Linking for the specific customer(s). Go to MobileTech Admin > Setup Options > Options > Customer Setup. Mark the checkbox in the Disable XOi Deep Linking column.

Setting	Description
UseXOiWorkflow	Determines if XOi Workflow is enabled. The default value is **False**. If set to **True**, a XOi Workflow option is added to the service appointment Completion window. Users select an Open XOi Vision hyperlink to open a browser to the XOi Vision web page where they log in and complete the XOi Workflow. The technician can capture an image and/or video that is uploaded to the XOi server. After returning to MobileTech and confirming the Workflow has been completed, the unique hyperlink is copied to the Resolution Note. After synchronizing, back-office users can view the attachment to the service call. Anyone with access to 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.
UseXOiDeepLinking	Determines if XOi Deep Linking is enabled. The default value is **False**. If set to **True**, an XOi Workflow option and an XOi Site History option are added to the appointment Resolution tab and the appointment form. When a technician selects the XOi Workflow's Open XOi Vision link, the XOi Vision app opens. The technician returns to MobileTech from within Vision. Also, when set to **True**, the XOi note hyperlinks are displayed in the appointment form. If the note hasn't been created, the technician sees this warning message: "Note for XOi Deep Linking has not been created yet". The technician can access the Vision app from within MobileTech to access the XOi Workflow and view site history. For more information on XOi deep linking, see Setting Up XOi Deep Linking (optional) (page 107).
XOiClient ID	Defaults to MobileTech. Display only.
XOiLoginURL	Defaults to the XOi login URL. Display only.
XOiVisionURL	Defaults to the XOi Vision endpoint. Display only.
XOiPartnerID	Enter the XOi Partner ID that was provided to you by XOi.

Quadra Integration

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 Service Call Quoting application, see https://www.thinkquadra.com/quadra-service-call-quoting/.

IMPORTANT

- Before you set up the Quadra Integration information, you must have the Quadra Service Call Quoting application installed.
- The user who is entering the Quadra parameters must have the sysadmin server role. This user does not have to be a 'sa' user.

Set Up Quadra Integration Information

Setting	Description
QuadraDbName	Enter your company database name such as QUADRA. e.g.
UseQuadra	Select **TRUE** to use the Quadra integration. The default value is **FALSE**.
QuadraAPIUrl	Enter the Quadra API URL.
QuadraAPIKey	Enter the Quadra API that was issued by ERTH.

Once you **save** the Setup Options window after setting up the integration, the Quadra Objects are created:

- View: FTQuadraRecommendationTemplateLookup
- Trigger: QuadraRecommendationTemplateTrigger
- Stored Procedure: WSMobileLoadQuadraRecommendationTemplate

Add the Quadra Template Recommendation

After setting up and saving the integration, you will also need to add the Quadra Recommendation Template in the Refresh Lookups window.

1. In MobileTech Admin, go to Tools > Refresh Lookups.
2. Scroll down and mark **Quadra Recommendation Template**.
3. Select *Refresh.*

Please contact ERTH to set up the Quadra Recommendation Sync Process at https://www.thinkquadra.com/contact-us/.

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, select *Setup Options*, and then select *Options* > *Attachment Extensions*. The Attachment Extensions Setup page displays a list of default extensions.
2. To add an extension type, select the **Add** icon.
3. In the **Extension** column, enter the type of extension for the attachment.
4. Select *Save*.

To delete an extension type, select an extension type and select the **Delete** icon. You can also select the *Refresh* icon to update the list.

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 are registered, and **UseFieldInvoicing** = **True** in the setup options.

1. In MobileTech Administration, select *Setup Options*, and then select *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. Select the *Save* icon to save the changes.

Set Up Report Email Options

You can specify options to send MobileTech reports via email. For information about Inspection Email Options, see Set Up Email Options for an Inspection Report (optional) (page 118).

1. In MobileTech Administration, select *Setup Options*, and then select *Options* > *Report Options*. The Report 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.
- **Customer**: You can define any Summary report (Call Summary, Appointment, or Job Appointment) for a specific customer (and a specific location). You can also filter to a specific Call Type and/or Division for the Summary report the customer receives. This lets you customize the Summary report for your customer's needs. For example, the type of report they receive, the subject line, and the body of the email. **-Default-** includes all customers (who don’t have a defined Summary report).
  Note: You can define a summary report for one or more customers (each a separate report line) and have a <Default> summary report line for all other customers to receive. For example, you define the Call Summary report for customer 102 and also have the <Default> call summary report. Only customer 102 will get their defined report and all other customers will receive the default Call Summary report.
- **Location**: After selecting the customer, you can also define a specific location for the Summary report. **-Default-** includes all locations for the selected customer. If a customer is not selected, this field is not enabled.
- **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. Select *Save.*

Optional: Adding Information to Email Subject Lines and Attachment Names

Service Call Call Reports

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

Parameter	Description
0	Service Call ID and Appointment Number
1	Location
2	Service Call ID
3	Short Service Call Description (30-character short description)

To add additional information with parameters:

1. In MobileTech Administration, select *Setup Options*, and then select *Options* > *Report Options*.
2. On the Report Email Options page, for the Call Summary, Appointment Summary, and/or Field Invoice Report, scroll to the **Email Subject** column.
3. In the **Email Subject** column, to include the following automatically, enter:
   - **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}**.
   - **Service Call ID and Short Description**: Enter a space and then type **{2} : {3}**.
   - **Service Call ID, Location, and Short Description**: Enter a space and then type **{2} : {1} : {3}**.
4. Select the *Save* icon and close the page.

Job Appointment Summary Report

You can set up MobileTech to automatically include the job number and appointment number in the email subject line and the name of the PDF attachment when the Job Summary report is sent via email.

Parameter	Description
0	Job Number and Appointment Number

To add additional information with parameters:

1. In MobileTech Administration, select *Setup Options*, and then select *Options* > *Report Options*.
2. On the Report Email Options page, for the Job Appointment Summary Report, scroll to the **Email Subject** column.
3. In the **Email Subject** column, enter a space and then type **{0}**.
4. Select the *Save* icon and close the page.

Time Sheet Report

You can set up MobileTech to automatically include the technician name (requesting the report) in the subject line and attachment filename. Add {0} to the Employee Time Sheet to use add the Technician's name as specified in the systemuser table.

Parameter	Description
0	Technician's Full Name

To add additional information with parameters:

1. In MobileTech Administration, select *Setup Options*, and then select *Options* > *Report Options*.
2. On the Report Email Options page, for the Time Sheet Report, scroll to the **Email Subject** column.
3. In the **Email Subject** column, enter a space and then type **{0}**.
4. Select 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, select *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. Select *OK*.
4. In the Woodford workspace, double-click your mobile project.
5. In the navigation pane, select **Note**, and then select *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, select the drop-down arrow for the **Name** – **Does Not Contain** – **Call Summary Report** condition, and then select *Delete* from the menu that appears.
7. When you have finished editing the sync filter, select *Save & Close* on the toolbar.
8. Select *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, select *Setup Options*, and then select *Options* > *TimeTrack Batch Options*. The TimeTrack Batch Options page is displayed.
2. Enter a custom batch name, or select to base the name on the technician ID, branch name, technician team, or service area.
3. You can optionally select to include the Time Track week-ending date or the transaction date in the batch name. Because either of these options contains 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. Select *Save*.

Set Up New Users

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

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 73). 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.

MobileTech users need to be set up as Registered Users window in TimeTrack and enabled for TimeTrack entry before creating the user in MobileTech Admin, regardless if they will be submitting time and/or expense transactions.

Add a User Before You Load Data and Sync Lookups

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 select the *Filter* icon. To clear the filter, select the *Clear Filter* icon.

1. In MobileTech Administration, select *Users*, and then select *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 username 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. Note: If the user doesn't have an email address set up already in Schedule's K2A_ResourceExtension table, once you save the record, the email address will also be added to Schedule. If there is an email address already set up for the technician, the email address won't be updated in Schedule.

- **Password** and **Confirm Password**: Enter and confirm a password that lets the user sign in to MobileTech. You have the option to Setup Password Complexity and Lockout Policy (page 27). You can use Resco's Admin Console to set up technician passwords. This option allows your technicians to change their MobileTech password on their device after you've sent them a temporary password. See Set Technician Passwords with Admin Console (optional) (page 91).
- **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.
- **Disabled** checkbox: Mark to disable the user account.
- **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 74) for information on creating roles.

2. Select *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, select *Users*, and then select *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. Select *Save*. The user is added to the list of users in the column on the left.
4. Select *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. Select *Refresh*.
7. Select *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. Select *Import*, and then select *Close*.

Buttons on this window

- **Add User**: Select to clear the window so that you can add a new user.
- **Undo**: Reverts the window to its previous state.
- **Save**: Select to save the new or updated user information.
- **Delete**: Select to delete the user.
- **Unlock**: Select to unlock a user. A user's account may be locked after x number of invalid login attempts. While you can set up the minutes a user is locked out of their account, you can also manually unlock their account. See Setup Password Complexity and Lockout Policy (page 27).
- **Import**: Select to open the Bulk User Load window. From this window, you can bulk import technicians and assign to the MobileTech role. See Import Multiple MobileTech Users (page 72).

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 and are set up as Registered Users in TimeTrack are listed. You can select only the number of technicians you purchased licenses for.

1. In MobileTech Administration, select *Users*, and then select *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 **MobileTech**.

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. Select *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 associated with open calls and appointments for each technician, and for the specified date range, is included.

Each time you load data, technicians are loaded in batches of 5. Lookups are processed first, followed by all items that are available to sync in the WSMobileTechSync table are processed first. To edit the number of technicians processed in the batch, in the MobileTechAdmin.exe.config, edit the numeric value in line <add key=LoadDataTechBatchCount' value="5">.

The progress information for the process is displayed as Integration Synchronization. After each technician is loaded, the check box is unmarked.

If any of the required lookup tables are missing records after the load data process, the Sync Lookups checkbox remains marked and disabled and the View Missing Lookups button is displayed. Select the View Missing Lookups button to display a popup window that lists the required lookups that do not have any records in their table. The required tables include callresolution, appointmentstatus, calltype, costcode, equipmenttype, extendedwarrantytype, manufacturer, paycode, problemtype, taskstatus, unitofmeasure, setupoption.

> If your company does not use the displayed required lookup(s), like the Extended Warranty Type, you do not have to do anything. This does not indicate that you have missing or bad data.

Loading Data

To load technician data:

1. In MobileTech Administration, select *Load Data*.
2. Mark the checkboxes for the technicians to load data for, or click *Select All* to mark all the technicians in the list.
3. Enter the date range.
   Note: We recommend limiting the date range to only include current and relevant data, excluding historical data for transactions. For performance reasons, the maximum date range is two months.
4. Mark the **Sync Lookups** checkbox.
   Note: If there is no data to sync in the following 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 71).
   - Call Resolution
   - Appointment Status
   - Call Type
   - Cost Code
   - Equipment Type
   - Extended Warranty Type
   - Manufacturer
   - Pay Code
   - Problem Type
   - Task Status
   - Unit of Measure
   - Setup Option

5. Select *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. Select *Close*.

Viewing Errors

If any errors occur, the far right column displays error information that includes: the technician batch, stored procedure (if applicable), and the error message. This information will only display on the parent sync. If any child syncs have errors, you will see “One or more errors occurred”. For example, Appointment is a parent sync, and Service Appointment Notes is a child sync.

- If multiple Child Syncs have issues, the first child sync issue from the related tech batch will be displayed in the parent sync.
- If multiple technician batches have errors, the last ran batch details will display.
- If a prior batch had an error but the last batch doesn’t, it will display the number of records, but keep the error image and details.

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. For information about the roles, see Woodford Roles Overview (page 112). 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*.

If you are using Resco Inspections:

- A user assigned to the Manager role should not be assigned to any other role within MobileTech as this affects what the user will see in the Resco Cloud dashboard. The Manager role synchronizes with the MobileTech Inspection Manager Woodford project.
- A technician should only have one role assigned, either Inspector or MobileTech. The assigned role determines which MobileTech Woodford project is used.
  - The Inspector role synchronizes with the MobileTech with Inspections Woodford (child) project.
  - The MobileTech role synchronizes with the MobileTech Woodford (parent) project.

Adding a New Role

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

Adding One or More Technicians to a Role

To assign a technician to a role:

1. In MobileTech Administration, select *Role Maintenance*.
2. Select the role you are assigning technicians to in the Role Name list.

3. Select *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 select the *Filter* icon. To clear the filter, select the *Clear Filter* icon.
5. Mark the checkbox(es) next to one or more technicians or click *Select All* to mark the checkboxes for the displayed technicians.
6. Select *Add*.

Removing One or More Technicians from a Role

1. In MobileTech Administration, select *Role Maintenance*.
2. Select 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. Select *Remove Technicians.*
5. Select *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, select *Role Maintenance*.
2. Select the role in the Role Name list.
3. Select *Delete Role*.
4. Select *Yes* in the confirmation window.

Deleting Multiple Roles

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

Switching Companies

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

Set Up Additional Companies

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

1. In MobileTech Administration, select *File* > *Change Company*. The Change Company page is displayed.
2. Select a company and select *OK*.
3. See Setting up MobileTech (page 25) to continue with the procedures to set up each company.

Set Up MobileTech on a Client Device

The following topics are also available in the MobileTech Client Help on the technician devices.

- First Time Logging into Mobile CRM (page 76)
- MobileTech Client Setup on a Mobile Device (page 76)
- Setting Up Host Syncing (page 80)

First Time Logging into Mobile CRM

The first time that a user logs into Resco's Mobile CRM, device users should make the following selections:

1. Launch the Mobile CRM app.
2. On the Meet Resco Mobile CRM screen, tap **Skip Tour**.
3. On the Welcome to Resco Mobile CRM screen, select **Internal User**.
4. On the Sync screen, select **Standard User** next to User Mode.
5. Enter the following:
    - **URL:** Enter the URL of MobileTech Integration Sync Server. The URL must include the server name, website port number, and company database name. Example: *https://mobiletech.company.com/companydatabase*.
      Note: The internal address will be *http://servername:8888/companydatabase*. Your IT manager will need to update the firewall rules to map the external SSL traffic to the internal MobileTech port of 8888.
    - **Username:** A technician's MobileTech username is the email address that is set up in MobileTech Administration. See Add a MobileTech User (page 71).
    - **Password:** A technician's password is set up in MobileTech Administration. See Add a MobileTech User (page 71).
6. To save the password, set the **Save Password** toggle to *On*.

MobileTech Client Setup on a Mobile Device

Working With MobileTech Setup Options

To access the MobileTech Setup Options, select **Setup** and then select **MobileTech**.

Viewing Options

The Options section displays your Technician ID, Employee ID, Employee Name, and the MobileTech Woodford version. All device settings are set up by your administrator in the MobileTech Woodford project.

Job Safety Analysis

If your company uses the Job Safety Analysis report from Resco, you will need to set **Use Legacy JSA** to *False*.

Setting Up Time Entry Default Pay Codes

To save time when you create unbilled and billable time, expense, and travel entries, you can set up default pay codes. You can select a different pay code, if necessary when you complete an entry on your mobile device. Pay codes are set and assigned to individual technicians in Service Management.

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. Select **Setup**.
2. Select **MobileTech**.
3. On the Setup page, select **Time Entry**.
4. Select the Default Unbilled pay codes to use for unbilled hourly, expense, and travel entries when you create timesheet entries.
5. Select the Default Billable pay codes to use for billable hourly, expense, and travel entries when you create time entries for appointments.
6. Select the **Save** icon.

Working With Resco Setup Options

The following setup options are from Resco. Some of the setup options below are not supported by MobileTech and changing these options may affect how the MobileTech works on your device.

1. Select **Setup**.
2. Select **Resco**.
3. Update the settings below and then select **Save**.

CRM	Displays your email address.
Online Mode	Displays the Online Mode as set up by your administrator.
Auto Sync	Displays the Auto Sync setting as set up by your administrator.
Sync Login	Select **On** to require that you log on to MobileTech before you sync your mobile device. Select **Off** if you want to be able to sync your mobile device without logging on to MobileTech.
Save Password	Select **On** to save your login 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 select **Off**, you must enter a password on the device when you start MobileTech.
Use Fingerprint (Android/iOS only)	Turn on to use your fingerprint, Touch ID, and/or Face ID to log into MobileTech. We recommend leaving this turned **Off** if you share a device.

Language	Not supported by MobileTech. By default, it is set to **Automatic** to use the language of your device.
New Form UI	Not supported by MobileTech.
Max Image Size	iOS Only - Select the maximum image size. Default / 640 x 480 / 1024 x 768 / 1600 x 1200 / 2048 x 1536 / 2592 x 1936
List Buttons	Not supported by MobileTech.
Map	Select **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	Not supported by MobileTech.
Change List	Not supported by MobileTech.
Design Dashboards	Not supported by MobileTech.
Private Charts	Not supported by MobileTech.
AutoFormGrid	Not supported by MobileTech.
Full Screen (Windows only)	This Windows-only option displays the full-screen setting as set up by your adminstrator. • **On** If you are using a Windows device, this option displays MobileTech in full-screen view. The title bar, including the icons for minimizing, maximizing, and closing the app, won't be displayed. • **Off** The title bar and the icons for minimizing, maximizing, and closing the app display.
Ask Before Exit (Windows only)	If you're using a Windows device, select **On** if you want to be prompted for a confirmation before closing MobileTech.

Call Via	Not supported by MobileTech.
Send Invites	Not supported by MobileTech.
Use Reminders	Not supported by MobileTech.
Send Email Via	Not supported by MobileTech.
HTML Emails	Not supported by MobileTech.
Signature	Not supported by MobileTech.
Exchange Folder	Not supported by MobileTech.
Show Images	Not supported by MobileTech.
Mark Email Read	Not supported by MobileTech.
Home Realm	Not supported by MobileTech.
ADSF Username	Not supported by MobileTech.
UseSystemOAuth	Not supported by MobileTech.
Web Service	Must be **XRM**. Other selections are not supported by MobileTech.
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.

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 100,000 records at one time, but you can decrease that number.
Diag. Sync Log	Use this option to log details for synchronizations.
Entity	Not supported by MobileTech.
AppFolder	Not supported by MobileTech.
Client Certificate	Not supported by MobileTech.
Pinned Certificate	Not supported by MobileTech.

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 you make on your mobile device, such as changes to the status 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:

- Select **Save** after creating a service call.
- Select **Save** after creating an appointment.
- Select **Complete an Appointment** after completing a service call appointment.
- Select **Save** after creating a purchase order.
- Select **Save** after creating a new piece of equipment.
- 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, create a purchase order, create a new piece of equipment, or request a timesheet report, the Sync page is displayed. You must select **Sync** to sync to the host system.

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

Automatically Sync 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 > Resco** screen.

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

1. Select the **Sync** icon.
2. If you encounter any issues while you're syncing, you can review and resolve them by selecting **Sync Errors**. For more information, see Resolving Sync Issues[29][30].

29. https://wennsoft.atlassian.net/wiki/spaces/mt2025/pages/579146642/Resolving+Sync+Issues
30. https://wennsoft.atlassian.net/wiki/spaces/mt2025/pages/579146642/Resolving+Sync+Issues

Map Unbilled Activities to General Ledger Accounts

Use the Activity Account Options window to map the Microsoft Dynamics GP GL accounts to unbilled activities used in MobileTech. When a technician adds an unbilled labor entry, the account number is automatically assigned to the mapped account.

After you've assigned an account to an activity, it displays in the window below the fields. Use the Refresh button to display any new activities added in Signature from the Technician Activity Setup. (See Setting Up Technician Activity IDs[31].)

To map MobileTech unbilled activities to Microsoft Dynamics GP GL accounts:

1. In MobileTech Administration, select **Setup Options**.
2. Select **Options** and then select **Activity Account Options**.
3. Select the **Activity** from the list.
4. Select the **Account** from the list.
5. Select *Submit*. The account number now displays to the right of the activity in the scrolling window.
6. Complete the activity/account mapping for each activity within the list.

> To update an activity with a different account, repeat steps 1-4. If you need to remove a mapping, select the activity, select the top blank line in the Account drop-down, and then select Submit.

Enter the Google Maps API Key

If you will be using the Mapping feature on any device, you must 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.)

> Microsoft announced on May 24, 2024, that they are deprecating Bing Maps. Customers using Bing Maps for Enterprise Basic or Free license will no longer be able to use Bing Maps for Enterprise services beyond **June 30, 2025**.

To enter the Google Maps API Key:

1. In MobileTech Administration, select *Tools > Launch Resco Cloud Dashboard*.
2. Enter the **Email** and **Password** and select *Log in*.
3. In the left navigation, select **Woodford**.
4. Open the MobileTech Woodford project.
5. In the navigation bar, select **Configuration**.
6. Select the Integrations tab.
7. In the Google section, enter the **Google API Key**.
8. Mark the **Lock** checkbox.
9. Select *Save* in the top navigation.
10. *Publish* the MobileTech Woodford project.

31. https://wennsoft.atlassian.net/wiki/spaces/sig2025/pages/595828554/Setting+Up+Technician+Activity+IDs

Setting Up Woodford (Optional)

After importing the Woodford file (page 21), you may want to set up the following options at your company's discretion. For example, if you haven't purchased the Resco Inspections module, you won't need to enable Resco Inspections and Job Safety Analysis, nor would you need to import templates.

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 MobileTech 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
- Equipment
- Contract equipment
- Location
- Sublocation
- Location Contact
- Job
- Job Cost Code
- Meter Reading
- Purchase Order
- Purchase Order Detail
- Purchase Order Receipt
- Purchase Order Receipt Detail

- Refrigerant Tracking
- Time log

Add Support Email Address (Optional)

MobileTech captures error conditions that can sometimes occur during use. These error conditions are captured in a MobileTech Error Log file that can be emailed to your MobileTech application manager or internal support resource. When technicians select Email Log Files in the MobileTech About window, this is the email address that defaults to the device's email client. If the Support Email field is left blank, the technician will need to enter the recipient's email.

1. In MobileTech Administration, select *Tools > Launch Resco Cloud Dashboard*.
2. Enter the **Email** and **Password** and select *Log in*.
3. In the left navigation, select **Woodford**.
4. Open the MobileTech Woodford project.
5. In the left navigation bar, under Design, select **Branding**.
6. Enter your company's email address that should receive the log files.
7. If the email address you enter has not been verified, you can do so at this time.
    - **Verify**: Select to have a verification code sent to the email address that was entered. You will then need to enter that code in the next window and select *Verify*.
    - **Skip**: Select to skip the verification and save the email address.
    - **Cancel**: Select to return to the Branding window without saving the email address. (To save the email address, you must select Verify or Skip.)
8. Select *Save*.
9. Publish the project.

Adding Purchase Order PO Lines to Home Screen (Optional)

You can add the PO Lines icon to the home screen so that your technicians can quickly access existing purchase order lines or add a new purchase order line to an appointment.

1. In MobileTech Administration, select *Tools > Launch Resco Cloud Dashboard*.
2. Enter the **Email** and **Password** and select *Log in*.
3. In the left navigation, select **Woodford**.
4. Open the MobileTech Woodford project.
5. In the left navigation bar, under **Components**, select **Home screen**.
6. Select **Add IFrame** and then select *Browse*.
7. Go to entity > purchaseorderdetail and select **purchaseorderdetail-list**.html.
8. Select *OK*.
9. In the Configure IFrame window, type **purchaseorderdetail** and then select *OK*.
10. If needed, move the item to where you want this displayed on the home screen.
11. Select *Save*.
12. *Publish* the project.

Automatically Free Up Unused/Inactive Licenses (Optional)

You can automatically free up licenses that haven't been synchronized in the last 90 days by marking the **Auto-free up unused licenses** option in Resco Woodford's Administration Settings.

1. In MobileTech Administration, select *Tools > Launch Resco Cloud Dashboard*.
2. Enter the **Email** and **Password** and select *Log in*.

3. In the left navigation, select **Woodford**.
4. Select **Settings**.
5. Under *Organization settings*, mark **Auto-free up unused licenses (not synchronized in last 90 days)**.
6. Select *Save*.

Edit Time Entry Minute Increment (Optional)

The default minute increment when manually entering time entries defaults to 1-minute increments. You can edit the increment value from 1 to 60 minutes.

> If you change the Time Log minute increment, this will change for all the date-time form inputs that have the ‘Normal’ style applied.

To edit the minute increment value:

1. In MobileTech Administration, select *Tools > Launch Resco Cloud Dashboard*.
2. Enter the **Organization** and select *Log in*.
3. Enter the **Email** and **Password** and select *Log in*.
4. In the left navigation, select **Woodford**.
5. Open the MobileTech Woodford project.
6. From the left navigation, under Entities, select **Time Log**.
7. From the menu bar, select *Show UI*.
8. Double-click **Default**.
9. From the menu bar, select *Edit Styles*.
10. Select **Normal**.
11. Edit the **Minute Increment** value (1 - 60 minutes).
12. Select *Save & Close* to save changes in the Edit Styles window.
13. Select *Save & Close* to save changes to the Time Log Default.
14. Publish the project.
15. Sync devices.

Enable Flexible Forms (Optional)

The Flexible Form is a way for users to get a perfect overview of any record at a glance. Instead of users selecting various tabs to 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**. You may lose the typical button functionality and could experience performance issues. Flexible Forms is not compatible with Microsoft Windows 11.

Enabling Flexible Forms

1. In MobileTech Administration, select *Tools > Launch Resco Cloud Dashboard*.
2. Enter the **Email** and **Password** and select *Log in*.
3. In the left navigation, select **Woodford**.
4. Open the MobileTech Woodford project.
5. In the left navigation bar, under **Settings**, select **Configuration**.
6. On the **UI** tab, in the **Forms** section, complete the following:

- **Flexible Forms**: Enable Flexible Forms by setting this to **True**.
- **Flexible Forms List Scrolling**: We recommend setting this option to **True** to use vertical scrolling. If set to False, the forms scroll horizontally on larger devices.

7. Select *OK*.
8. *Publish* the MobileTech Woodford project.

- Smaller devices like smartphones 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 (Optional)

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 select 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 80).

1. In MobileTech Administration, select *Tools* > *Launch Resco Cloud Dashboard*.
2. Enter the **Email** and **Password** and select *Log in*.
3. In the left navigation, select **Woodford**.
4. Open the MobileTech Woodford project.
5. Navigate to the **Auditing** tab on the left panel.
6. Under *Auditing Settings*, mark the following checkboxes:
   - **Enable** (this defaults to marked for Sync Dashboard, see Using Sync Dashboard (optional) (page 97))
   - **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. Select *Yes* when prompted with "Track GPS position is obsolete function replaced by Location Tracking. Are you sure to turn it on?"
7. 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.
8. You will also need to set up the following options in MobileTech Admin. See Mobile Device Global Settings (page 37) 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.

9. Select *Save*.
10. *Publish* the project.

Enable Service Call Creation for Inactive Customers and/or Inactive Locations

For Signature 2021 (18.04b06) or higher, new service calls cannot be created for an inactive customer's service locations and inactive locations. If you want your technicians to be able to create new service calls for inactive customers' locations and/or inactive locations, you will need to make offline HTML modifications.

The directions below are for enabling for both inactive entities, enabling for only inactive customers, or enabling for only inactive locations. (The directions for enabling service calls for both inactive customers and inactive locations combine the separate instructions.)

- Enable Service Call Creation for Both Inactive Customers and Locations (page 87)
- Enable Service Call Creation for Inactive Customers (page 88)
- Enable Service Call Creation for Inactive Locations (page 88)

Enable Service Call Creation for Both Inactive Customers and Locations

For Signature 2021 (18.04b06) or higher, new service calls cannot be created for inactive customers' service locations and inactive service locations. If you want your technicians to be able to create new service calls for these inactive entities, you will need to make offline HTML modifications. The following directions are for enabling service call creation for both inactive customers and inactive locations.

To enable service call creation for only inactive customers' service locations, see Enable Service Call Creation for Inactive Customers (page 88) or to enable for only inactive service locations, see Enable Service Call Creation for Inactive Locations (page 88).

Update the New Service Call Form

To enable service call creation from the New Service Call Form:

1. In MobileTech Administration, select *Tools > Launch Resco Cloud Dashboard*.
2. Enter the **Email** and **Password** and select *Log in*.
3. In the left navigation, select **Woodford**.
4. Open the MobileTech Woodford project.
5. In the left navigation under Components, select **Offline HTML**.
6. Double-click **entity**.
7. Double-click **servicecall**.
8. Select **servicecall-form_new.html**.
9. From the menu bar, select *Edit*.
10. In the Edit window, scroll down to `// ----- LOCATION -----`.

11. Locate the line **if (afterVersion2018R6) {**
12. Add the *comment out* slashes // to the front of the following lines:
    entity.addFilter().where(SCHEMA.location.Properties.isinactive, 'eq', 'false');
    customerLink.addFilter().where(SCHEMA.customer.Properties.isinactive, 'eq', 'false');
13. Select *Save* in the Edit window.
14. Select *Save*.
15. *Publish* the project
16. Sync the devices.

Enable Service Call Creation for Inactive Customers

For Signature 18.04b06 or higher, new service calls cannot be created for inactive customers' service locations. If you want your technicians to be able to create new service calls for an inactive customer's service locations, you will need to make offline HTML modifications.

> To enable service call creation for only inactive locations, see Enable Service Call Creation for Inactive Locations (page 88) or to enable for both inactive customers and inactive locations, see Enable Service Call Creation for Both Inactive Customers and Locations (page 87). (The directions for enabling service calls for both inactive customers and inactive locations combine the separate instructions.)

Update the New Service Call Form

To enable service call creation for inactive customers' service locations from the New Service Call Form:

1. In MobileTech Administration, select *Tools > Launch Resco Cloud Dashboard*.
2. Enter the **Email** and **Password** and select *Log in*.
3. In the left navigation, select **Woodford**.
4. Open the MobileTech Woodford project.
5. In the left navigation under Components, select **Offline HTML**.
6. Double-click **entity**.
7. Double-click **servicecall**.
8. Select **servicecall-form_new.html**.
9. From the menu bar, select *Edit*.
10. In the Edit window, scroll down to
    ```
        // ----- LOCATION -----
    ```
    .
11. Locate the line **if (afterVersion2018R6) {**
12. Add the *comment out* slashes // to the front of the following line:
    customerLink.addFilter().where(SCHEMA.customer.Properties.isinactive, 'eq', 'false');
13. Select *Save* in the Edit window.
14. Select *Save*.
15. *Publish* the project
16. Sync the devices.

Enable Service Call Creation for Inactive Locations

For Signature 18.04b06 or higher, new service calls cannot be created for inactive service locations. If you want your technicians to be able to create new service calls for inactive locations, you will need to make offline HTML modifications.

To enable service call creation for only inactive customers, see Enable Service Call Creation for Inactive Customers (page 88) or to enable for both inactive customers and inactive locations, see Enable Service Call Creation for Both Inactive Customers and Locations (page 87). (The directions for enabling service calls for both inactive customers and inactive locations combine the separate instructions.)

Update the New Service Call Form

To enable service call creation for inactive locations from the New Service Call Form:

1. In MobileTech Administration, select *Tools* > *Launch Resco Cloud Dashboard*.
2. Enter the **Email** and **Password** and select *Log in*.
3. In the left navigation, select **Woodford**.
4. Open the MobileTech Woodford project.
5. In the left navigation under Components, select **Offline HTML**.
6. Double-click **entity**.
7. Double-click **servicecall**.
8. Select **servicecall-form_new.html**.
9. From the menu bar, select *Edit*.
10. In the Edit window, scroll down to `// ----- LOCATION -----`.
11. Locate the line **if (afterVersion2018R6) {**
12. Add the *comment out* slashes // to the front of the following line:
    `entity.addFilter().where(SCHEMA.location.Properties.isinactive, 'eq', 'false')`
13. Select *Save* in the Edit window.
14. Select *Save*.
15. *Publish* the project
16. Sync the devices.

Enable the Automatic Timesheet Generation After Job Appointment Completion (Optional)

1. In MobileTech Administration, select *Tools* > *Launch Resco Cloud Dashboard*.
2. Enter the **Email** and **Password** and select *Log in*.
3. In the left navigation, select **Woodford**.
4. Open the MobileTech Woodford project.
5. From the left navigation, select **Offline HTML**.
6. Double-click **Entity** to open.
   Double-click **Appointment** to open.
7. Select **appointment-form_complete-job.html** and then select *Edit* from the menu bar.
8. Scroll down to *FORM EXECUTIONS*.
9. Locate **//,generateTimesheetReport(appointment) //Uncomment line to turn on automatic generation of timesheets**.
10. Remove the preceding **//,** and succeeding **//Uncomment line to turn on automatic generation of timesheets** so that the line only displays the following.
    generateTimesheetReport(appointment)
11. Select *Save*.
12. Select *Save* from the menu bar.
13. *Publish* the project.

Filter Service Call Types (Optional)

Your organization may want to limit the Service Call Types that technicians can select when creating a new service call or editing an existing service call on their device. For example, you may not want your technicians to be able to select the MC call type.

1. In MobileTech Administration, select *Tools* > *Launch Resco Cloud Dashboard*.
2. Enter the **Email** and **Password** and select *Log in*.
3. In the left navigation, select **Woodford**.
4. Open the MobileTech Woodford project.
5. In the left navigation under Components, select **Offline HTML**.
6. Double-click **entity**.
7. Double-click **servicecall**.
8. Complete the steps below.

New Service Call Form

This is the form where technicians create a new service call. MCC is already set up as excluded from the Call Type drop-down when creating a new service call.

1. Select **servicecall-form_new.html**.
2. From the menu bar, select Edit.
3. Scroll down to the function **fetchCallType**.
4. Locate the line:
   `entity.addFilter().notIn(SCHEMA.calltype.Properties.name, ["MCC"]);`.
5. After the "MCC" enter the call type(s) to be excluded from the Call Type drop-down in the new service call form in MobileTech.
   For example, to exclude MC from displaying, you would add **,"MC"** so that the line reads as
   `entity.addFilter().notIn(SCHEMA.calltype.Properties.name, ["MCC","MC"]);`
6. Complete the previous steps to exclude additional call types, if necessary.
7. Select *Save*.
8. *Publish* the project or continue editing below.

Pending Service Call Form

This is the form where technicians are editing a service call that they have created and not yet synced. MCC is already set up as excluded from the Call Type drop-down when creating a new service call.

1. Select **servicecall-form_pending.html**.
2. Scroll down to the function **fetchCallType**.
3. Locate the line:
   `"<value>MCC</value>" +`.
4. Directly below that line, enter a new line for each service call type that you don't want to display.
   For example, to exclude MC from displaying, enter this line:
   `"<value>MC</value>" +`
5. Complete the previous steps to exclude additional call types, if necessary.
6. Select *Save*.
7. *Publish* the project or continue editing below.

Service Call Default Form

This is the default service call form. MCC and MC call types are already set up as excluded. You would only need to edit this Offline HTML form if you are excluding any other call types.

1. Select **servicecall-form_default.html**.
2. From the menu bar, select *Edit*.
3. Scroll down to the function **fetchCallType**.
4. Locate the line:
   `"<value>MCC</value>" +`
5. Directly below that line, enter a new line for each service call type that you don't want to display.
   For example, to exclude AS from displaying, enter this line:
   `"<value>AS</value>" +`
6. Complete the previous steps to exclude additional call types, if necessary.
7. Select *Save*.
8. *Publish* the project.

Enable Multi-Factor Authentication

Enabling Multi-Factor Authentication for Resco Cloud (On-Prem)

To enable Multi-Factor Authentication (MFA) for Resco Cloud (on-prem), you will need to connect your Resco Cloud to a custom Active Directory Federation Services (ADFS), please follow the steps available at https://docs.resco.net/wiki/Connect_Resco_Cloud_to_custom_ADFS. Enabling MFA is an optional setup and is not required.

> The App Password that is set up by the technician in the Resco Mobile App (MobileTech) for MFA is separate from the technician's user password. Technicians will need to keep the App Password in a safe location because this password cannot be recovered.

Set Technician Passwords With Admin Console (Optional)

Using Resco's Admin Console, you can set up a password for your technician(s) and, if you select to, require the technician to change the password in MobileTech. For steps on how to set the password in Admin Console, see Resco's Wiki Documentation at https://docs.resco.net/wiki/Admin_Console#Set_password. If you would rather set up technician passwords in MobileTech Admin, see Add a MobileTech User (page 71).

> With a default installation, we do not set any password policy requirements. If you want to enforce such requirements see Setup Password Complexity and Lockout Policy (page 27).

To set technician password(s):

1. In MobileTech Administration, go to *Tools* > *Launch Resco Cloud Dashboard*.
2. From the left navigation, select **Admin Console**.
3. Under Resources, select **Users**.
4. Select one or more users, then select **Set Password** from the menu bar.
5. Select what password-related management tasks do you want to perform:

- **Random**: Check to generate a new random password for the selected users. **Note**: If you marked Random, the random password will only display in the confirmation message. You will need to copy this to include with the communication to your technicians.
- **New password** and **Confirm password**: Enter a new password for the users.
- **Must change password**: Mark to require users to change their password the next time they connect to the backend server.
- **Send to users by email**: Mark to send an automated email with the new password. **Note**: This option is not currently working as expected. Additionally, if you mark this option, the password is not displayed in the confirmation window.

6. Select *Confirm*.
7. Select *OK* in the confirmation window.

After you confirm the password, a message displays in the Admin Console window that includes the password that you've just entered. You will need to make a note of this password to email the affected technicians.

Technician Resetting Password

Once you've updated the password, the change takes place immediately for the selected technician(s). When the technician syncs their device, they will receive a message that says they can't connect and that the server login has failed. These steps are also available in MobileTech Help, see Log into MobileTech[32].

1. In MobileTech, select the Sync icon and a message displays "Can't connect. Server Login Failed."
2. Select *OK*.
3. Select the Sync icon again to open the Sync window.
4. Clear the password field (shows as dots, not the actual password) and enter the temporary password that was sent to you.
5. Select the Sync icon.
6. In the **Change password** window, enter the password sent by Admin in the **Old Password** field.
7. Enter the new unique password in the **New Password** and **Confirm Password** fields.
8. Select *Submit*.
9. In the *Password was successfully changed* message, select *OK*.
10. Sync your device.

Set the Fetch Limit (Optional)

The Fetch Limit is the number of records the SERVER MODE fetches at a time.

UseServerMode must be set to **TRUE** in MobileTech Admin Mobile Device Global Settings (page 37). This setting defaults to TRUE.

Setting the Fetch Limit on the New Service Call Form

For the New Service Call form 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 form if the number of customers, locations, and equipment records are equal to or greater than the fetchLimit value.

32. https://wennsoft.atlassian.net/wiki/spaces/mt2025/pages/579145699/Log+into+MobileTech

To set the fetch limits for the New Service Call form:

1. In MobileTech Administration, select *Tools > Launch Resco Cloud Dashboard*.
2. Enter the **Email** and **Password** and select *Log in*.
3. In the left navigation, select **Woodford**.
4. Open the MobileTech Woodford project.
5. Navigate to the **Offline HTML** tab on the left panel.
6. Double-click **entity** to open.
7. Double-click **servicecall** to open.
8. Select **servicecall-form_new.html** and then select *Edit*.
9. Scroll down to INITIAL SETTINGS.
10. Update the **var fetchLimit** value. The default is 100.
11. Select *Save* to close the Edit window.
12. Select *Save* to save the project.
13. *Publish* the project.
14. Technicians will need to synchronize to update the MobileTech Client.

Set Up the MobileTech Inspection Manager (Optional)

Behind the scenes, the manager's experience is a Woodford project with the app name "Manager". The MobileTech Inspection Manager project has been designed to run in the web app, in your browser, on a computer. Only the technicians with the Inspector role will display in the Inspection Manager app. For more information, see Resco's Wiki: https://docs.resco.net/wiki/Manager%27s_experience.

The Manager web app includes:

- **Calendar**: View all technicians' appointments. You can select to view all appointments, job appointments, service appointments, and technician activities. The display options include Agenda, Day, Week, or Month. Appointments are color-coded based on the appointment type (job, service, or technician activity). The filter for the calendar view is the Previous, Current, and Next Month. Appointments cannot be created for technicians in the Inspection Manager.
- **Dashboard**: View the inspection information in chart views that includes the duration per template, duration per user, passed and failed templates. You can select the chart icon in each card that allows you to change the chart type that is displayed. The Dashboard is configurable in Woodford (Dashboard > My Dashboard)
- **Technicians**: View a list of technicians with the Inspector role. Select the technician's name to view:
  - Contact information. If you are using Schedule, the telephone number entered in Schedule (Administration > Resource Options) auto-populates in the Mobile Phone field. You will need to Load Data in MobileTech Admin (Tools > Load Data) to update the telephone number in the MobileTech Inspection Manager web app. If you update the technician's phone number in Resco Cloud, this will not update the phone number in Schedule.
  - Appointments: Select an appointment to view additional information.
  - Inspections:
    - View a list of the technician's inspections or change to a chart view. In the list view, select an inspection to view the form.
    - If the inspection hasn't been completed, you can edit the inspection and save the changes, complete the inspection, and create the mobile report. However be aware that if the technician makes changes to the inspection, changes made in the Inspection Manager will overwrite the technician's changes.
    - View the technician's submitted (saved) inspection reports.
- **Editors**: Provides access to the Inspection Designer and the Mobile Report Editor.
- **Result Viewer**: View completed questionnaires or export them for further analysis
- **Submitted Reports**: View the saved inspection reports for all technicians. The filter displays reports submitted in the previous and current weeks. You can select other filters by selecting the Filter button.

Importing the Manager Project in Woodford

1. In MobileTech Administration, select *Tools > Launch Resco Cloud Dashboard*.
2. Enter the **Email** and **Password** and select *Log in*.
3. In the left navigation, select **Woodford**.
4. Select *Import* and navigate to C:\Program Files (x86)\Signature\MobileTech\Admin\Manager. (Or to the location where MobileTech has been installed to.)
5. Select MobileTech Inspection Manager 10-x-xx.woodford in the Add Mobile Project window and then select *Open*.
6. In the Import Project window, for Type, select **Standard User**, and then select *Next*
7. From the **App** drop-down, select **Create a new app...**
8. In the **New App Name** field, enter *Manager*, and then select *Next*.
9. In the **Roles** section, select **Manager**.
10. Select *Create*.
11. *Publish* the project.

Update the URLs for the Inspection Manager Home Screen

While in the MobileTech Inspection Manager Woodford project, you will need to update the URL for the Inspection Designer, Mobile Report Editor, and Result Viewer.

> ⚠ This URL must be a fully qualified domain name (FQDN) like *example.com*[33] or *another.example.com*[34] and not contain a port, such as *example.com:8888.*

1. In MobileTech Administration, select *Tools > Launch Resco Cloud Dashboard*.
2. Enter the **Email** and **Password** and select *Log in*.
3. In the left navigation, select **Woodford**.
4. Double-click the Inspection Manager Project.
5. Select **Home screen** in the left navigation.
6. Select **Inspection Designer**, select *Properties*, and replace the "localhost.local" with your FQDN URL and click *OK*.
7. Select **Mobile Report Editor**, select *Properties*, and replace the "localhost.local" with your FQDN URL and click *OK*.
8. Select **Result Viewer**, select *Properties*, and replace the "localhost.local" with your FQDN URL and click *OK*.
9. Select *Save*.
10. *Publish* the project.

Creating the Manager User

The Manager user is created in Resco Cloud and does not use a MobileTech user license.

> ⚠ The user with the Manager role should not be assigned to any other role within MobileTech as this affects what the user will see in the Resco Cloud dashboard. For information on the roles, see Woodford Roles Overview (page 112).

To create the Manager user:

33. http://example.com
34. http://another.example.com

1. In MobileTech Administration, select *Tools* > *Launch Resco Cloud Dashboard*.
2. From the Admin Console tile, select *Open Admin Console*.
3. Under Resources in the left navigation, select **Users**.
4. Select **New** from the menu bar.
5. Complete the following fields:
    - First Name
    - Last Name
    - Email
    - Password
    - Confirm Password
6. From the Roles drop-down, select **Manager**.
7. Select *Add* to add the Manager role to the new user.
8. Select *Save & Close*.

Accessing Inspection Manager Web App

The Manager accesses the MobileTech Inspection Manager web app by logging into Resco Cloud and the Web App displays or from the Resco Cloud Dashboard, select the Resco App card.

Set Up the Sync Date Filters (Optional)

Beginning with MobileTech 7.5, the Start Sync Date filters are now set up in Woodford and are a global setting. Before 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 MobileTech Woodford project and use different Roles to identify those different sync rules. For more information, see Sync Filter - Resco's Wiki[35].

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

- **Appointment**
- **Customer**
- **Equipment**
- **Job Safety Task**
- **Job Safety Task Response**
- **Service Call**
- **Subtask**
- **Task**
- **Task Response**

To set up the Sync Date filters:

1. In MobileTech Administration, select *Tools* > *Launch Resco Cloud Dashboard*.
2. Enter the **Email** and **Password** and select *Log in*.
3. In the left navigation, select **Woodford**.
4. Open the MobileTech Woodford project.
5. 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.
6. Click *Sync Filter* in the top navigation.
7. In the Edit Filter window, to the right of each Start Date:
    a. Enter a new value for **Last X Months**.

35. https://docs.resco.net/wiki/Sync_Filter

   b. Enter a new value for **Next X Months**.
8. Select *Save*.
9. Complete the same steps for the other entities, making sure to enter the same values as the first entity.
10. *Save* the project.
11. *Publish* the project.

Turn Off Appointment Creation (Optional)

If you do not want your technicians to be able to create appointments in MobileTech, you can remove the Create permission from the Appointment entity in the MobileTech Woodford project.

1. In MobileTech Administration, select *Tools* > *Launch Resco Cloud Dashboard*.
2. Enter the **Email** and **Password** and select *Log in*.
3. In the left navigation, select **Woodford**.
4. Open the Woodford Project.
5. In the left navigation, scroll down to Entities and select **Appointment**.
6. In the Entity Permissions section, unmark **Create**.
7. *Save* and *publish* the project.
8. Sync devices.

Turn Off Service Call Creation (Optional)

If you do not want your technicians to be able to create service calls in MobileTech, you can remove the Create permission from the Service Call entity in the MobileTech Woodford project.

1. In MobileTech Administration, select *Tools* > *Launch Resco Cloud Dashboard*.
2. Enter the **Email** and **Password** and select *Log in*.
3. In the left navigation, select **Woodford**.
4. Open the Woodford Project.
5. In the left navigation, scroll down to Entities and select **Service Call**.
6. In the Entity Permissions section, unmark **Create**.
7. *Save* and *publish* the project.
8. Sync devices.

Turn Off Technician Activity Creation From Calendar (Optional)

Suppose you do not want your technicians to be able to create technician activities from the calendar in MobileTech. In that case, you can remove the Create permission from the Technician Activity entity in the MobileTech Woodford project.

1. In MobileTech Administration, select *Tools* > *Launch Resco Cloud Dashboard*.
2. Enter the **Email** and **Password** and select *Log in*.
3. In the left navigation, select **Woodford**.
4. Open the Woodford Project.
5. In the left navigation, scroll down to Entities and select **Technician Activity**.
6. In the Entity Permissions section, unmark **Create**.
7. *Save* and *publish* the project.
8. Sync devices.

Use the GP Australia Telephone Number Format (Optional)

The Australian telephone number format displays as just numbers without spaces and no formatting. For example, 12345678901234. This is based on the mobile device's localization information. If you would prefer the Australian-specific XX XXXX XXXX ext: XXXX (example: 12 3456 7890 ext:1234) formatting for these forms, contact your WennSoft Customer Support Representative.

For a 14-digit phone number, if the last four digits of the extension are 0000, these last 4 digits will be removed.

The following areas display the updated telephone number format:

- Additional Work Form
- Location Contact Form
- Location Contact List

Use the Sync Dashboard (Optional)

The Sync Dashboard is a comprehensive monitoring tool that gives you a 360° 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/.

Disabling the Sync Dashboard

1. In MobileTech Administration, select *Tools* > *Launch Resco Cloud Dashboard*.
2. Enter the **Email** and **Password** and select *Log in*.
3. In the left navigation, select **Woodford**.
4. Open the MobileTech Woodford project.
5. Navigate to the Auditing panel on the left menu.
6. Unmark **Enabled**. (This will also unmark Log synchronization event.)
7. Publish the MobileTech Woodford project.
8. Syncing a device to log sync activity.
9. Open a browser and enter your MobileTech server name.
10. On the Resco Cloud Apps & Tools window, select **Sync Dashboard**.

Enabling the Sync Dashboard

1. In MobileTech Administration, select *Tools* > *Launch Resco Cloud Dashboard*.
2. Enter the **Email** and **Password** and select *Log in*.
3. In the left navigation, select **Woodford**.
4. Open the MobileTech Woodford project.
5. Navigate to the Auditing panel on the left menu.
6. Mark **Enabled** and mark **Log synchronization event**.
7. Publish the MobileTech Woodford project.
8. Syncing a device to log sync activity.
9. Open a browser and enter your MobileTech server name.
10. On the Resco Cloud Apps & Tools window, select **Sync Dashboard**.

Enable Replacement Parts Tab for All Calls (Optional)

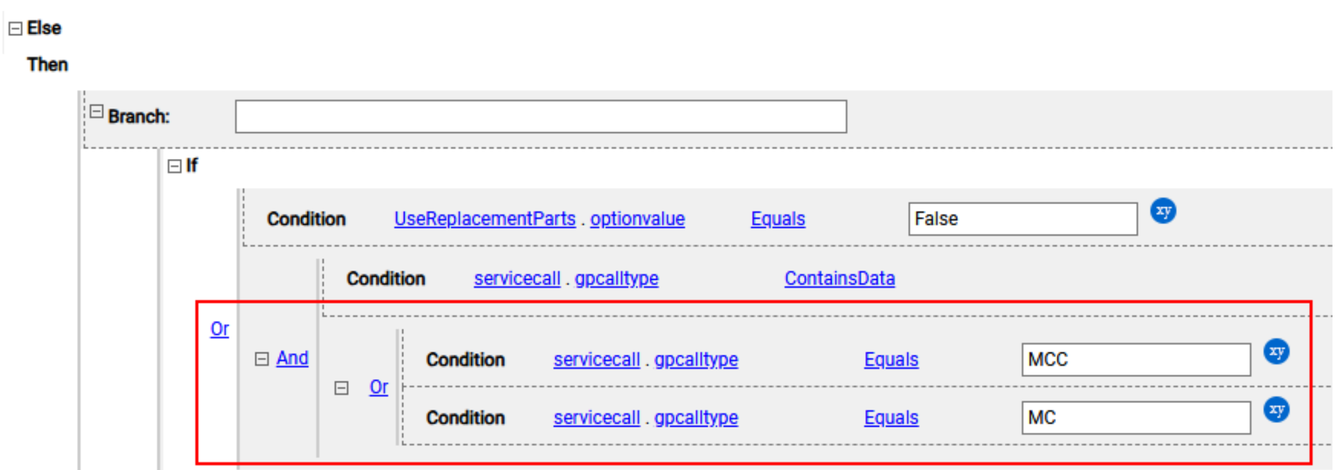
The UseReplacementParts setup option in Equipment Settings (page 50) in MobileTech determines whether the Replacement Parts tab is displayed for equipment assigned to the service call on the Appointment Completion form for service appointments. The default value is **False**.

If set to **True**, the Replacement Parts tab is displayed for non-MC/MCC calls. If you want this to display for either or both of these calls, you can edit the **Complete - Service Appointment** form in Woodford.

To enable the Replacement Parts tab for MC and/or MCC calls:

1. In MobileTech Administration, select *Tools > Launch Resco Cloud Dashboard*.
2. Enter the **Email** and **Password** and select *Log in*.
3. In the left navigation, select **Woodford**.
4. Open the Woodford Project.
5. In the left navigation, select Appointment.
6. Select *Show UI*.
7. Select the **Complete - Service Appointment** form and click *Edit*.
8. Select *On Load*.
9. Scroll down to **Branch: Replacement Parts Visibility** and expand this section by clicking the + icon.
10. Under the **Else** statement, remove either or both conditions for MCC or MC.
11. Click *Save & Close* to close the On Load window.
12. Click *Save & Close* to close the Complete - Service Appointment form.
13. Publish the project.

Click to view screenshot of Else statement.



Setting 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.

- Set Up TimeTrack (page 99)
- Set Up Attachments To Be Sent to Technicians (page 100)

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, select *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. Select *Save*.

Entering Unbilled Transactions

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

1. In Microsoft Dynamics GP, select *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. Select *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

MobileTech users must be set up as Registered Users window in TimeTrack and enabled for TimeTrack entry, regardless if they will be submitting time and/or expense transactions.

Additionally, for the technician's manager to be notified by email when a timesheet is submitted for approval, 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. Select the attachment (paperclip) icon next to the **Service Call ID** field. The Document List window is displayed.
3. Select *Add*. The Document Maintenance window is displayed.
4. Select a format and a file.
5. Select the **Copy To Database** option. Copy to Database must be selected to send attachments to devices. Attachments will not be sent to the device if you do not select this option.
6. Specify any additional information and select *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, select *Microsoft Dynamics GP* > *Tools* > *Setup* > *Service Management* > *Lookup Setup* > *Technicians* > *Technicians*. The Technician Setup window is displayed.
2. Select the technician ID.
3. Select *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. Select *OK*, and then select *Save* in the Technician Setup window.
6. Repeat steps 2 through 5 for each technician.
7. Open MobileTech Administration and select *Load Data*.
8. Select a technician and a date range.
9. Make sure the **Sync Lookups** checkbox is marked.
10. Select *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, select *Inquiry* > *Service Management* >*Mobile Pay Code Setup*. The MobileTech Pay Code Setup window is displayed.
2. Select whether each pay code is billable, unbillable, or both. The default value is **Both** for all pay codes.
3. Select *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, select *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. Select *Save*.

Setting Up the Parts Needed Snippet

You can create a specific "parts needed" resolution note snippet in Signature that when selected in MobileTech (9.5 or higher), the Site Inventory list opens. Technicians can select the part and quantity needed. The resolution note snippet includes additional information related to the selected part.

- The curly brackets and information within the brackets have to be exactly as written.
- The resolution code also must be PN.
- You can enter any descriptive text and the information does not have to be specifically written on separate lines.
- The Quantity line is optional. If you want the Quantity field to display in the pop-up form, add the Quantity line.

1. In the Resolution Note Snippets window, create a new snippet with the code **PN**.
2. In the Description, enter information similar to the following:
   Part Needed
   Name: {name}
   Site: {site}
   Item Number: {itemnumber}
   Description: {description}
   Unit of Measure: {unitofmeasure}
   Quantity: {quantity}
3. Select *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, select *Cards* > *Purchasing* > *Vendor*. In the Vendor Maintenance window, create a record for the vendor.
2. In Microsoft Dynamics GP, select *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, select *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. Select *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 (page 102).
- 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.

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 Set Up Attachments To Be Sent to Technicians (page 100).

Set Up and Assign Work Crews for Appointments

You can create work crews 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, select *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. Select *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, select *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 select *Insert* to add the employee to the work crew. To remove a crew member, select the employee in the **Crew Members** grid and select *Remove*.

If an employee who was a member of a work crew has an *Inactive* status, select *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 Job Safety Tasks (page 49).

If any JSA task responses are marked as required in Service Management, the Legacy JSA Report can not be requested until all required responses are entered.

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, select *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 select *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, select *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 select *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 Naming Conventions for JSA Task List IDs and Task Codes[36].

1. In Microsoft Dynamics GP, select *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 Set Up Responses for JSA Tasks[37].
4. Complete the remaining fields, as necessary, and then select *Save*. Repeat these steps for each task code that you need to set up.

> Skill levels have no effect on JSA task codes.

When you create task codes, you can also set up responses so technicians can respond to the tasks in the task list.

> You can have one task response (List or Text) per task code.

To set up a response for a task code:

1. In Microsoft Dynamics GP, select *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. Select the *Responses* button. The Task Responses Setup window is displayed.
4. Select a response type:
    - **List**: This option provides the user with a drop-down list of user-defined responses in the service call.
    - **Text**: This option allows the user 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?*

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36. https://wennsoft.atlassian.net/wiki/pages/resumedraft.action?draftId=6620366#SettingUpInformationinMicrosoftDynamicsGP-naming-conventions
37. https://wennsoft.atlassian.net/wiki/pages/resumedraft.action?draftId=6620366#SettingUpInformationinMicrosoftDynamicsGP-setup-responses

6. If you selected the **List** response type, select 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.*
    Note: 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.

    See "Setting Up Task Responses" in the Service Management documentation for more information about setting up responses.
7. Complete the remaining fields, as necessary, and then select *Save*. Select *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[38].
All job safety task lists must have task list type of **JSA**.

1. In Microsoft Dynamics GP, select *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.
   Note: 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 select **Tasks**. The Task List Detail window is displayed.
5. Select the task codes to include in the list and select *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. Select *OK*, and then select *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

38. https://wennsoft.atlassian.net/wiki/pages/resumedraft.action?draftId=6620366#SettingUpInformationinMicrosoftDynamicsGP-naming-conventions

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, select *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 select *OK*. This makes the *Sublocations* button available in the Location window.
3. In Microsoft Dynamics GP, select *Cards* > *Sales* > *Customer*. Enter or select a customer. Select the *Location* button, enter or select a location, and then select 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, select *Setup Options*. Under **Mobile Device Global Settings**, make sure **UseBarcoding** = **True**.

Setting Up XOi Deep Linking (Optional)

XOi Deep Linking allows users to click a link in MobileTech to open XOi's Vision app. Within the Vision app, users click a Return button to go back to MobileTech.

- XOi Integration Setup in Schedule (page 107)
- Overview (page 108)

XOi Integration Setup in Schedule

The XOi Integration Setup in Schedule is used by XOi Technologies to access a specific API that is used by XOi for the Deep Linking workflow feature. This information must be provided to XOi. (A Schedule Administrator can print the contents of this window from a browser.) The XOi Integration Setup section is conditionally enabled if the See feature is registered for MobileTech, otherwise this tab is hidden. After setting up the integration, two XOi user roles are created and are hidden from the User Roles window. The XOi user is hidden from the User Detail window.

XOi Deep Linking is:

- Compatible with MobileTech v8 and higher.
- Available for supported versions of Signature 2016 and Signature 2018.
- Enabled in Schedule 4.5 and higher.

IMPORTANT:

- XOi Deep Linking must be first be enabled in MobileTech Admin. See XOi Integration (page 64) in the MobileTech Installation & Administration Guide for more information.
- If you have any customers who do not allow the use of XOi onsite, you can disable XOi Deep Linking for the specific customer(s). Go to MobileTech Admin > Setup Options > Options > Customer Setup. Mark the checkbox in the Disable XOi Deep Linking column.
- Verify the mapped Call and Appointment Summary Reports in MobileTech include the XOi Resolution box. If they do not, the XOi Resolution link will not appear. The simplest solution is to modify the base query and add the exact XOi Resolution box with visibility rules to match the newest version of the report. Another option is to utilize the newest version of the report and re-implement all customizations to the report, but this will take a far longer time. Wennsoft PSO is recommended for these customizations, and generally they will take no more than 30 minutes to perform, depending on whether the data source has already been customized or not. For complex customizations of reports with custom stored procedures or non-standard functionality, the time may increase.

To set up the XOi Integration in Schedule:

1. In Schedule, select the menu icon and then select **Administration**.
2. Select the **Integrations** tab.
3. Under **Account Detail**:
   - **User Name:** Displays the user name for the XOi integration.
   - **Password:** Enter the XOi password.
   - **Confirm Password:** Enter your XOi password again. If you've mistyped the password, an error message displays that the passwords don't match.
4. Under **Integration Details**, complete the following fields:
   - **API URL:** Displays the Schedule API URL.
   - **Signature Version:** Displays the current Signature major version.
5. In the **Active Dynamics Companies** section, all active companies' details (**Company Name** and **Company ID**) are shown as more than one company may need to be set up with XOi Technologies. The Active Dynamics Companies list includes all active Dynamics companies that may or may not have Signature and/or Schedule installed.

Overview

With XOi Deep Linking turned on and XOi integration set up in Schedule, this is what you can expect to happen with Schedule service appointments. In XOi's Vision app, a job is the same as a service appointment in MobileTech.

1. A new service call with an appointment is created in Schedule, Signature, or MobileTech. The appointment is assigned to a technician and scheduled.
   Note: If the service appointment is created in MobileTech, the technician will need to sync their device to send the appointment to the back office. The XOi integration will run and the notes will be added to the appointment in the back office and will be available when the technician syncs again, however, it could take a while for the XOi Vision notes to be created (based on the XOi polling cycle, syncing of data, etc.).
2. XOi polls for new appointments that are scheduled and assigned or completed for technicians whose email addresses are also valid XOi Vision email addresses.
3. In XOi Vision, the job is created automatically based on the service appointment in Service Management.
4. The Schedule API creates several read-only notes that are attached to the service appointment.
   - **XOi Site History:** This *internal* note contains the hyperlink to the Job Activity in the Vision app. This note is required to display the XOi Site History field on the service appointment.

- **XOi Workflow:** This *internal* note contains the hyperlink to the job. This note is required to display the XOi Workflow field on the service appointment.
- **XOi Resolution:** This note contains the URL to view any related photos and/or videos on the Vision website and is included in the Call (or Appointment) Summary report.
- **XOi Transcript:** This note contains Vision's video transcription.
  Note: This note is generated after the Vision platform processes the audio, which may be hours after the appointment is completed, so the XOi Video Transcription note will not be included on the Appointment Summary report. There may be up to three XOi Transcript notes, named XOi Transcript, XOi Transcript 2, and XOi Transcript 3.

Working With Resco Inspections (Optional)

Resco Inspections is designed to perform the entire inspection process and the ability to generate a report directly on a device, immediately after completing an inspection. You can customize the report directly in the Questionnaire Designer or Report Designer. For information about how to use Resco's Questionnaire Designer and Report Designer, go to https://docs.resco.net/wiki/Mobile_reports_for_Resco_Inspections.

Resco Inspections is enabled in the MobileTech with Inspections project, however, you will need to assign the Inspector Role to any technicians using Inspections (and the optional Job Safety Analysis). If you will be using the Job Safety Analysis, you must complete the steps to enable here: Enable Job Safety Analysis (optional) (page 110). Resco has a 30-day trial that you can use to evaluate Resco Inspections. After the trial, to purchase the Resco Inspections module for MobileTech, contact your WennSoft Customer Success Manager. If you do not want to purchase Resco Inspections, you will need to Disable Resco Inspections (page 109).

The Inspection Report filename is limited to 51 characters (this includes any appended date or timestamp information and the MIME type '.pdf'). If the Inspection Report name exceeds 51 characters, the Inspection Report annotation entity fails with the sync error: String or binary data would be truncated.

Assign Inspector Role in MobileTech Admin

In MobileTech Admin, assign the Inspector role to the technicians using Inspections (and the optional Job Safety Analysis).

Importing the MobileTech With Inspections Project

Inspections are enabled if you have imported the MobileTech with Inspections project.

See Import the MobileTech Woodford Project (page 21) for instructions on creating the child project and importing the MobileTech with Inspections project.

Disable Resco Inspections

To remove Inspections, there are a few steps that you need to perform in the Woodford Project.

Remove the Inspections icon from the Home navigation

1. In MobileTech Administration, select *Tools* > *Launch Resco Cloud Dashboard*.
2. Enter the **Email** and **Password** and select *Log in*.

3. In the left navigation, select **Woodford**.
4. Open the MobileTech Woodford project.
5. In the left navigation, in the **Components** section, select *Home screen*.
6. Select **Inspections | Questionnaire**.
7. From the menu bar, select *Remove*.
8. Select *Save.*

Remove the Inspections icon from the Appointment Completion forms

1. While still in the MobileTech Woodford project, scroll down to Entities.
2. Select **Appointments**.
3. From the menu bar, select *Show UI*.
4. Select **Complete - Job Appointment**.
    a. From the menu bar, select *Edit*.
    b. Select **Inspections (*)**.
    c. From the menu bar, select *Delete*.
    d. Select *Save & Close*.
5. Select **Complete - Service Appointment**.
    a. From the menu bar, select *Edit*.
    b. Select **Inspections (*)**.
    c. From the menu bar, select *Delete*.
    d. Select *Save & Close*.
6. Continue with the step below.

Disable Inspections

1. While still in the MobileTech Woodford project, scroll down to **Settings**.
2. Select **Inspections**.
3. Clear the mark from the **Enable Inspections** check box.
4. Select *Save*.
5. *Publish* the project.

Disable Branch_inspection and Technician_team Entities

1. While still in the MobileTech Woodford project, scroll down to **Entity**.
2. Select **Technician Team - Inspection**.
3. From the menu bar, select *Disable* and then select *Save*.
4. From the left navigation under Entity, select **Branch - Inspection**.
5. From the menu bar, select *Disable*, and then select *Save*.

Enable Job Safety Analysis (Optional)

If you are using Resco Inspections, you have the option to use the Job Safety Analysis (JSA) inspection from the service and/or job appointment completion form. The inspection is tailored to ask specific questions about the site, to allow the Technician to identify hazards, and to document the steps they will take to remove risk. When the inspection is completed, a Job Safety Analysis report is generated as a PDF file and is attached to the service call on the device. When synced to Signature, the JSA is attached to the service call (for service appointments) or the job's cost code (for job appointments). To have the report automatically emailed to the technician, you will need to Set up Report Email Options (page 67) for Job Safety Audit option, selecting Service, Job Cost, or All.

The JSA report is also available as an attachment in Microsoft Dynamics GP.

If the JSA is created for:

- A service appointment, the attachment is saved to the service call.
- A job appointment, the attachment is saved to the job's Cost Code.

If you prefer to use the legacy JSA Task List while using Resco Inspections, you do not have to complete the setup steps below. However, on each device, you will need to go to Settings > MobileTech and toggle **Use Legacy JSA** to *Yes*.

In addition to the Mobile Admin JSA Setup Options (see Job Safety Tasks (page 49)), you must complete the steps below to enable Job Safety Analysis from the Resco Cloud Dashboard. You will also need to complete the steps in Working with Resco Inspections (optional) (page 109). To review the steps for completing a Job Safety Analysis on a device, please go to Complete a Job Safety Analysis Inspection[39] in MobileTech Help.

To enable the Job Safety Analysis form and report, you will need to complete the following steps.

Import the Job Safety Analysis Report to Report Designer

1. In MobileTech Administration, go to *Tools* > *Launch Resco Cloud Dashboard*.
2. On the Reports tile, select *Open Reports*.
3. Select *Import.*
4. The window opens to the previous location (Program Files (x86)/Signature/MobileTech/Admin/Inspections/Job Safety Analysis).
5. Select **Job Safety Analysis.xml**.
6. Select *Open.*
7. In the Import New Mobile Report window, enter the **Name** of the report: *Job Safety Analysis*.
   IMPORTANT: This report name must match the report filename.
8. Select *OK.*
9. Select the **Job Safety Analysis** report.
10. Select *Activate*.

Import the Job Safety Analysis Inspection in Questionnaire Designer

1. From the top left navigation, click the back arrow to exit Report Designer.
2. From the Questionnaire Designer tile, select *Open Questionnaire Designer*.
3. From the menu bar, select *Import.*
4. Navigate to the Program Files (x86)/Signature/MobileTech/Admin/Inspections/Job Safety Analysis folder.
5. Select **Job Safety Analysis.qbuilder**.
6. Select *Open*.
7. In the Questionnaires List window, select **Job Safety Analysis**.
8. From the menu bar, select *Activate.*

Set Use Legacy JSA to FALSE on Each Device

If you are using Job Safety Analysis, each device will need to have **Use Legacy JSA** set to *False* in MobileTech Settings. If this step is not performed, the JSA Tasks icon displays on the appointment completion form.

This device settings option only displays if the user has the Inspector role assigned in MobileTech Admin.

1. On the device, select *Setup*.
2. Select *MobileTech*.
3. Select *Job Safety Analysis*.

39. https://wennsoft.atlassian.net/wiki/spaces/mt2025/pages/579148369/Complete+a+Job+Safety+Analysis+Inspection

4. Set *Use Legacy JSA* to **False**.
5. Select *Save*.

Use Job Safety Unsafe Status Setup Option

If setup option "JobSafetyUnsafeStatus" is set and the Inspection report is completed with "Is location safe?" set to "No", then the appointment status will be set to the JobSafetyUnsafeStatus. The appointment cannot be completed and will be removed from the device on the next sync. See Job Safety Tasks (page 49) for more information.

Import Templates to Resco Inspections (Optional)

You can import ready-made templates into Inspections using the Questionnaire Designer in Resco's Cloud Dashboard.

- Importing .CSV and Excel Files (page 112)
- Importing Images and PDF Documents (page 112)

Importing .CSV and Excel Files

You can import questions from specially prepared CSV or Excel files into the Questionnaire Designer as new templates. See Resco's Wiki for information on how to import a .csv or Excel file[40] to create an inspection.

Importing Images and PDF Documents

You can import any PNG image or PDF document as a new template. This function uses Amazon Textract[41] for parsing documents. The file should be no more than 10 pages long and its size less than 10 MB. See also the limitations of the service[42], such as supported languages. For information on completing the Questionnaire Wizard, see https://docs.resco.net/wiki/Questionnaire_Designer.

> You can convert up to 200 pages for free. If you need more, set up an AWS account[43] and activate Textract; you can then enter your Amazon credentials in the Questionnaire Designer. If you will be purchasing a license, you will need **Analyze Document API for pages with tables and forms**. The price per analyzed page (for the 1st million pages) is: $0.015 + $0.05 = **$0.065.**

Woodford Roles Overview

Your Woodford User Role controls what cards display on the RescoCloud Dashboard. For information about how to use Resco's Questionnaire Designer and Report Designer, go to https://docs.resco.net/wiki/Mobile_reports_for_Resco_Inspections.

40. https://docs.resco.net/wiki/Releases/Autumn_2021#Create_questionnaire_templates_by_importing_Excel.2FCSV_files
41. https://aws.amazon.com/textract/
42. https://docs.aws.amazon.com/textract/latest/dg/limits.html
43. https://docs.aws.amazon.com/textract/latest/dg/setting-up.html#setting-up-signup

<table>
<tr><th>Role</th><th>Cards</th></tr>
<tr><td>System Administrator</td><td>

Questionnaire Designer: The Designer gives you the tools to create practically any questionnaire. Add different types of components, set styles, and add custom logic via rules.
Results Viewer: The Inspections tool allows you to filter and view the results of the completed questionnaires one by one. On top of that, the results can be quickly exported into a .csv format.
Woodford: Advanced customization and configuration tool that allows you to change the standard layout and extend its behavior. No programming needed.
Admin Console (Full Access): Server administration center for the backend configuration. Manage users, import data, create entities and fields, and much more. Recommended only for administrators.

Data
Manage Data
Entities
Entity Maps
Auto-Numbering
Processes Center
Processes
Logs
Plug-in Assemblies
Settings
Auditing
Organization
Environments

Reports: The Report Designer enables you to set up mobile reports that provide a clear-cut overview of your data. These reports can be exported in PDF, Word, Excel, or HTML format and easily shared with customers, partners, back office, or any other stakeholders.
Sync Dashboard: (page 97) The Sync Dashboard gives administrators a 360° overview of sync details that can be further filtered according to chosen preferences.

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

<table>
<tr><th>Role</th><th>Cards</th></tr>
<tr><td><u>Manager</u> (page 93)
(Set up in Resco Cloud)</td><td>The Manager web app includes:

Calendar: View all technicians' appointments. You can select to view all appointments, job appointments, service appointments, and technician activities. The display options include Agenda, Day, Week, or Month. Appointments are color-coded based on the appointment type (job, service, or technician activity). The filter for the calendar view is the Previous, Current, and Next Month. Appointments cannot be created for technicians in the Inspection Manager.
Dashboard: View the inspection information in chart views that includes the duration per template, duration per user, passed and failed templates. You can select the chart icon in each card that allows you to change the chart type that is displayed. The Dashboard is configurable in Woodford (Dashboard > My Dashboard)
Technicians: View a list of technicians with the Inspector role. Select the technician's name to view:

Contact information. If you are using Schedule, the telephone number entered in Schedule (Administration > Resource Options) auto-populates in the Mobile Phone field. You will need to Load Data in MobileTech Admin (Tools > Load Data) to update the telephone number in the MobileTech Inspection Manager web app. If you update the technician's phone number in Resco Cloud, this will not update the phone number in Schedule.
Appointments: Select an appointment to view additional information.
Inspections:

View a list of the technician's inspections or change to a chart view. In the list view, select an inspection to view the form.
If the inspection hasn't been completed, you can edit the inspection and save the changes, complete the inspection, and create the mobile report. However be aware that if the technician makes changes to the inspection, changes made in the Inspection Manager will overwrite the technician's changes.
View the technician's submitted (saved) inspection reports.

Editors: Provides access to the Inspection Designer and the Mobile Report Editor.
Result Viewer: View completed questionnaires or export them for further analysis
Submitted Reports: View the saved inspection reports for all technicians. The filter displays reports submitted in the previous and current weeks. You can select other filters by selecting the Filter button.

</td></tr>
<tr><td>All Other Roles (MobileTech, Inspector)</td><td>

Woodford
Admin Console (Limited Access): Server administration center for the backend configuration. Manage users, import data, create entities and fields, and much more. Recommended only for administrators.

Data

Manage Data
Entities

Processes Center

Logs

<u>Sync Dashboard:</u> (page 97) The Sync Dashboard gives administrators a 360° overview of sync details that can be further filtered according to chosen preferences.

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

Limit Inspections to Technician Teams and/or Branches (Optional)

If you have Global Filtering turned on in Signature, you can limit access to Inspections by one or more technician teams and/or one or more branches. This provides you with the ability to have inspection reports that are customized for technician teams and/or branches set up in Signature. **If you imported the MobileTech with Inspections project, this feature defaults as enabled in the project. You will still need to refresh lookups, import the sync filters, and associate the templates as well as sync devices.**

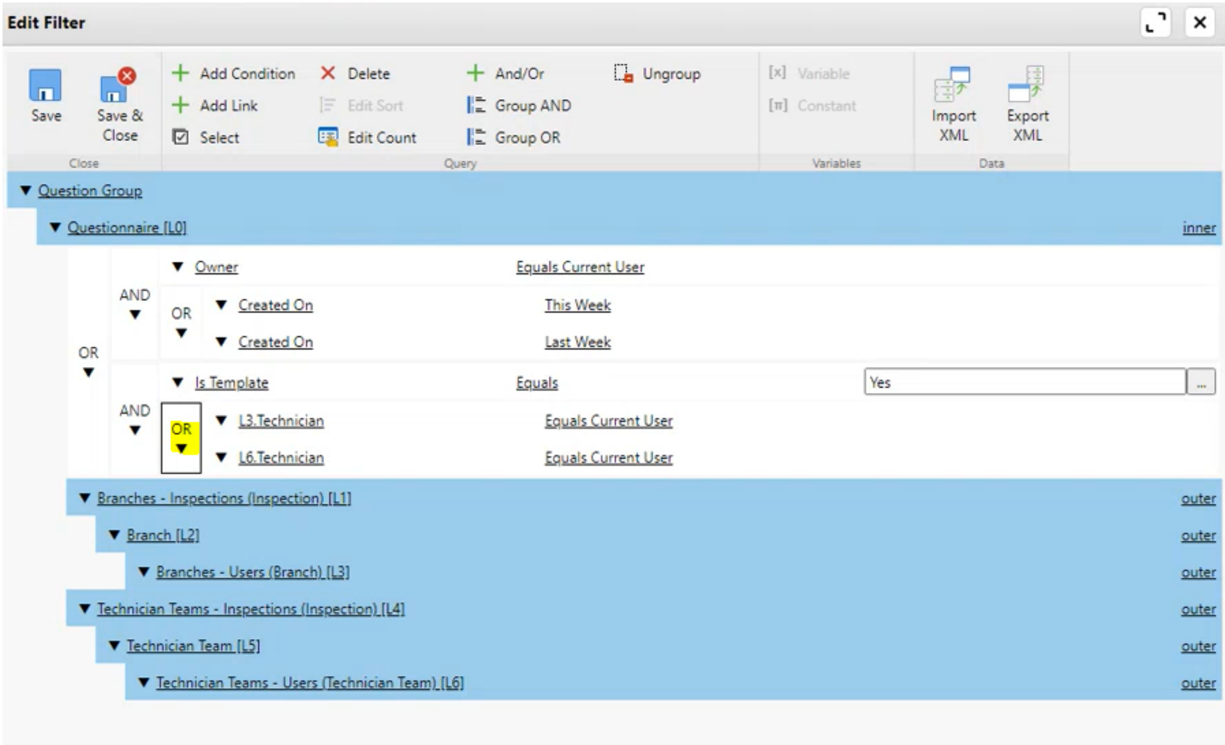
Refreshing Lookups

1. In MobileTech Administration, go to *Tools* > *Refresh Lookups*.
2. Scroll down to Employee, if you are restricting access by:
   - Technician team: Select **Technician Team** and **Technician Team User**.
   - Branch: Select **Branch** and **Branch User**.
   - Technician team or branch: Select **Technician Team**, **Technician Team User**, **Branch**, and **Branch User**.
3. Select *Refresh*.

Importing Sync Filters in the Woodford Project

If you decide to change how you are limiting access (for example, you decide to limit by branch instead of only technician team, etc.), you can import the appropriate sync filters without needing to remove the previous sync filters.

> ⚠ The sync filters for Technician Team and Branch are set up to display the inspection on devices that have either the technician team or the branch that is associated with the inspection. (See *Associate Inspection Templates* below.) If you require that the access be limited to a technician team and branch, you will need to change the operand on the sync filter(s) that you import for the technician team and branch.
> Change the highlighted operand to "AND" to require the technician to have both the team and branch be assigned in Signature for the associated team and branch on the Inspection to display on their device. This operand needs to be changed on all the technician team and branch sync filters that you've imported.



To import the Sync Filter:

1. In MobileTech Administration, select *Tools* > *Launch Resco Cloud Dashboard*.
2. Enter the **Email** and **Password** and select *Log in*.
3. In the left navigation, select **Woodford**.
4. Open the project.
5. Under Entities in the left navigation, scroll to and select **Inspection**.
6. From the menu bar, select *Sync Filter*.
7. In the Edit filter window, select *Import XML*.
8. Navigate to Signature/MobileTech/Admin/Inspections/Filters/ and select the appropriate sync filter:
    - **Technician Team**: filter-Technician Team
    - **Branch**: filter-Branch
    - **Technician Team and Branch**: filter-Technician Team and Branch
9. Select **filter-Inspection** and select *Open*.
10. Select *Save & Close*.
11. *Publish* the project.

Associating Inspection Templates

1. In MobileTech Administration, select *Tools* > *Launch Resco Cloud Dashboard*.
2. Enter the **Email** and **Password** and select *Log in*.
3. Open the **Questionnaire Designer**.
4. Select the inspection template and from the menu bar, select *Associate*.
5. Select *Add*. (You can remove an associated entity by selecting the entity and then select *Remove*.)
6. Select the appropriate entity from the drop-down.
    - branch_inspection
    - technicianteam_inspection

7. Select the team or branch.
8. Select *OK* in the Select Entity window.
9. Repeat steps 5 - 8 to associate additional entities to the Inspection.
10. Select *OK*.

Syncing Devices

The final step is to sync devices to restrict the inspections that display.

Setting Up Inspection Synchronization and Enabling Technician Team and/or Branch

If you have imported the MobileTech with Inspections project, you do not need to perform any of the following steps as these are already set up. The instructions are provided if you have manually enabled Inspections on the other non-Inspections MobileTech project available in the C:\Program Files (x86)\Signature\MobileTech\Admin\Woodford folder. After you've completed the following, you will also need to complete the steps above that include refreshing lookups, importing sync filters, associating templates, and syncing devices.

Setting Up Inspection Synchronization

1. In MobileTech Administration, select *Tools* > *Launch Resco Cloud Dashboard*.
2. Enter the **Email** and **Password** and select *Log in*.
3. In the left navigation, select **Woodford**.
4. Open the MobileTech Woodford project.
5. Under Entities in the left navigation, scroll to and select **Inspection** (or Questionnaire).
6. Select the **Synchronization** drop-down and select *Always Full Sync*.
7. Select the **Incremental Linked SyncFilter** drop-down and select *Enable*.
8. From the menu bar, select *Save*.

Enabling Technician Team and/or Branch

If you are only limiting access by a technician team or branch, you will only need to enable the respective entity. If you will be limiting access by both the technician team and branch, enable **both** entities.

Enable Technician Team - Inspection

1. In MobileTech Administration, select *Tools* > *Launch Resco Cloud Dashboard*.
2. Enter the **Email** and **Password** and select *Log in*.
3. In the left navigation, select **Woodford**.
4. Open the MobileTech Woodford project.
5. Under Entity in the left navigation, scroll to and select **Technician Team - Inspection**.
6. From the menu bar, select *Enable*.
7. Select the **Synchronization** drop-down and select *Always Full Sync*.
8. Select the **Incremental Linked SyncFilter** drop-down and select *Enable*.
9. From the menu bar, select *Save*.

Enable Branch - Inspection

1. In MobileTech Administration, select *Tools* > *Launch Resco Cloud Dashboard*.

2. Enter the **Email** and **Password** and select *Log in*.
3. In the left navigation, select **Woodford**.
4. Open the MobileTech Woodford project.
5. Under Entity in the left navigation, scroll to and select **Branch - Inspection**.
6. From the menu bar, select *Enable*.
7. Select the **Synchronization** drop-down and select *Always Full Sync*.
8. Select the **Incremental Linked SyncFilter** drop-down and select *Enable*.
9. From the menu bar, select *Save*.

Set Up Email Options for an Inspection Report (Optional)

An inspection report can be emailed in one of three ways, automatic email sent via the server (to a distribution list and to selected location contacts, depending on the selected setup option), manual email sent via the server, or manual email sent via the device.

> ⚠ The Job Safety Analysis inspection report automatic email is set up in the Report Email options window. See Set Up Report Email Options (page 67).

If the email is sent via the server (see **Automatic Email Distribution List** below):

- The email information (Email From Address, Subject, and Body) is static and cannot be changed.
- The email is sent to a distribution list and selected location contacts, depending on the selected setup option.
- The Source (sender) email address is defined on the Inspection Email Options page.
- Depending on the setup in Report Settings (page 34):
  - Only one report can be attached per email. (Default setting)
  - Inspection reports are attached to one email.
  - Inspection reports and the Call Summary report are attached to one email.

If the email is sent via the device (see **Manual Email to Location Contacts** below):

- The device's email client opens with the email information populated, but this can be edited.
- Multiple reports can be attached per email as long as their inspection regarding entity corresponds to the same location.
- The technician's email is displayed as the Source (sender).

Automatic Email to Distribution List and Location Contacts

You can set up the system to automatically email inspection reports to a distribution list and/or to location contacts that the technician selects when completing an appointment, depending on the option you select. The Inspection Email Options must be set up for the specific report to enable the email to the distribution list.

Setting Up Inspection Report Email Mode

1. In MobileTech Administration, select *Setup Options*.
2. On the Setup Options window, in the Report Settings section, for InspectionReportEmailMode, choose from the following:
   - **Do not send inspection report emails**: This is the default value. When selected, the inspection report is not automatically sent. The technician can manually send the report from the device.
   - **Send when inspection report is first created**: Sends the inspection report when the technician syncs after creating the report. The report is sent automatically to the designated recipients in Inspection Email Options.

- **Selected or entered by technician**: Sends the inspection report(s) related to an appointment when the appointment is completed to the designated recipients in Inspection Email Options. The technician can also select one or more Contact email addresses to send the inspection report(s). The technician can also enter new contacts and customers' email addresses. This option allows technicians the ability to add a contact on-the-fly.

3. Select *Save.*

Setting Up Inspection Report Options

The distribution list is specified in the Inspection Options window in MobileTech Admin.

1. In MobileTech Administration, select *Setup Options*, and then select *Options* > *Inspection Options*. The Inspection Email Options page is displayed.
2. Set up the following information to automatically send inspection reports to the specified email address(es).
   - **Inspection Source:** All active/published inspection templates are available in the drop-down except for the Job Safety Analysis.
   - **Email Technician:** This checkbox defaults to marked so that the technician also receives the inspection report. This field is required if the Email To Addresses is blank. Both fields can be populated.
   - **Email To Addresses:** Enter the email address(es) that will automatically receive the inspection report. You can enter multiple email addresses as long as they are separated by a comma. This field is required if the Email Technician checkbox is not marked. Both fields can be populated.
   - **Email From Address:** This is the email address that the report shows as being sent from, regardless of the technician that created the report.
   - **Email Subject:** The subject of the email message.
   - **Email Body:** The body text of the email message.
3. Select *Save.*
4. In MobileTech Client, after a technician saves a new appointment inspection report, an email with this report attached is automatically sent when the appointment is completed, provided the Inspection Email Options exist for the corresponding inspection template.

Manual Email to Location Contacts

Notes:

- In order to send an inspection report to a location contact, the inspection has to be regarding an entity that has a location (appointment, equipment, location, or service call).
- If the inspection regarding entity is no longer on the device (for example, an appointment is completed), the user will receive the following message: "Regarding Entity is no longer on the device. Do you want to fetch it from the server?" By selecting Yes, the entity is retrieved from the server (internet connection needed) and the report can be emailed.
- If the user ran the inspection report but didn't save it, they will receive a message that states: "No Report File exists for this Inspection. Please run and save Mobile Report."

Manual Email to Location Contacts Via Server

This option is a manual email that is created by the technician and sent to the location contact(s) they select. The email is sent via the server after the appointment is completed.

1. In MobileTech Administration, select *Setup Options*, and then select *Options* > *Inspection Options*. The Inspection Email Options window is displayed.
2. The following fields are automatically set up upon installation.
    - **Inspection Source:** Select SERVER EMAIL DELIVERY, which lets the technician select which location contact(s) to receive the report as an email attachment.
    - **Email Technician:** Mark this option so that the technician also receives the inspection report. This field is required if the Email To Addresses is blank. Both fields can be populated.
    - **Email To Addresses:** Leave this field blank as the report will be sent to the location contact(s) the technician selects. However, you may enter email addresses to automatically receive the inspection report without the technician needing to select the location contact(s). Multiple email addresses must be separated by a comma. This field is required if the Email Technician checkbox is not marked. Both fields can be populated.
    - **Email From Address:** This is the email address that the report shows as being sent from, regardless of the technician who created the report.
    - **Email Subject:** The subject of the email message.
    - **Email Body:** The body text of the email message.
3. Select *Save* if you have made any changes.
4. In MobileTech Client, a technician manually selects an Inspection from the ‘Completed’ view and then clicks on the “Email” button to open the Location Contact list. After selecting the desired location contact(s) and clicking ‘>’ Next, the email is sent when the device is synced.

Manual Email to Location Contacts Via Device

This option is a manual email that is created by the technician and sent to the location contact(s) they select. The email is sent via the email client on the technician's device. The Inspection must be related to an entity (appointment, equipment, location, or service call) that has a corresponding location. Server email delivery is the default method with the installation for sending inspection reports. To send the inspection report from the device's email client, you will need to remove the SERVER EMAIL DELIVERY row from the Inspection Email Options window.

1. In MobileTech Administration, select *Setup Options*, and then select *Options* > *Inspection Options*. The Inspection Email Options window is displayed.
2. Delete the SERVER EMAIL DELIVERY row of information by selecting the row and then selecting the Delete icon.
3. Select *Save.*
4. In MobileTech Client, a technician manually selects an Inspection from the ‘Completed’ view and clicks on the “Email” button to open the list of available inspection reports for that location. Multiple reports may be sent in one email provided they are all related to the same location. After selecting the report(s), the technician clicks the email icon to open the Location Contact list. After selecting the desired location contact(s) and clicking ‘>’ Next, the device’s email client will open a new email editor with the attachments and email to addresses. The email can be edited before it is sent from the technician’s email provider.

Enable the Tree View Folder Structure for Inspections (Optional)

Users can view their inspection reports in a tree view folder structure that matches the Questionnaire folders in Resco. For information on working with folders in the Questionnaire Designer, see https://docs.resco.net/wiki/Questionnaire_Designer#Folders_group.

To enable the tree view folder structure:

1. In MobileTech Administration, select *Tools* > *Launch Resco Cloud Dashboard*.
2. Enter the **Email** and **Password** and select *Log in*.
3. In the left navigation, select **Woodford**.
4. Open the MobileTech Woodford project.
5. Under **Components**, select *Home screen*.

6. From the top navigation, select *Add IFrame*.
7. In the Configure IFrame window, select *Browse.*
8. Navigate to utility > questionnaire, and select *questionnaire-list_folder.html*.
9. Select *OK*.
10. In the **Name** field, enter a descriptive name like Inspection Folder View.
11. Select *OK*.
12. Drag the **Inspection Folder View** so that it is under Inspections.
13. (optional) Select an icon from the icon images to the far right to display on the device.
14. Select *Save*.
15. *Publish* the project.
16. Sync the devices.

Update the Available Views (Optional)

You have the ability to remove views from the Inspection window. For example, if you only want to show the Completed and In Progress views and not display "In progress or complete", you can remove the latter view in Resco Woodford.

1. In MobileTech Administration, select *Tools* > *Launch Resco Cloud Dashboard*.
2. Enter the **Email** and **Password** and select *Log in*.
3. In the left navigation, select **Woodford**.
4. Open the MobileTech Woodford project.
5. Under **Components**, select *Home screen*.
6. On the Home screen, select *Inspections*.
7. From the top navigation, select *Properties*.
8. In the Public List Properties window, clear the checkbox for any view to not display.
9. Select *Save & Close*.
10. Select *Save*.
11. *Publish* the project.
12. Sync the device.

Import Questions From Images/PDF Documents (Optional)

You can import any PNG image or PDF document as a new template. This function uses Amazon Textract[44] for parsing documents. The file should be no more than 10 pages long and its size less than 10 MB. See also the limitations of the service[45], such as supported languages. For information on completing the Questionnaire Wizard, see https://docs.resco.net/wiki/Questionnaire_Designer.

⚠ You can convert up to 200 pages for free. If you need more, set up an AWS account[46] and activate Textract; you can then enter your Amazon credentials in the Questionnaire Designer. If you will be purchasing a license, you will need **Analyze Document API for pages with tables and forms**. The price per analyzed page (for the 1st million pages) is: $0.015 + $0.05 = **$0.065.**

To import an image or PDF document as a new template:

1. In MobileTech Administration, select *Tools* > *Launch Resco Cloud Dashboard*.
2. Enter the **Email** and **Password** and select *Log in*.

44. https://aws.amazon.com/textract/
45. https://docs.aws.amazon.com/textract/latest/dg/limits.html
46. https://docs.aws.amazon.com/textract/latest/dg/setting-up.html#setting-up-signup

3. On the Questionnaire Designer tile, select *Open Questionnaire Designer*.
4. Select *New* from the toolbar or click **New Questionnaire** from the questionnaire list to start the new questionnaire wizard.
5. Select **Scan and Extract** and accept Amazon Textract terms and conditions and privacy policy.
6. Select **Textract Credentials** and enter your Amazon Textract account information. You do not need to enter the Textract account information if you are still within the 200 pages free limit.
7. Select *Next* and upload the file with your questions.
8. Select the questions that you want to import. You can also modify labels and question types as needed.
9. Select Next.
10. Enter the questionnaire name.
11. Select if you want to turn Scoring on.
12. Select *Next*.
13. Select if you want to turn on **Versioning**.
14. Select the **Template Dependency**.
15. Select the **Answer Storage** method.
16. Select *Next*.
17. Select if you want to **Optimize Rules Performance**.
18. Select if you when to **Validate Answers**.
19. Select *Create* to create the template.

Inspection Validation During Appointment Validation Check (Optional)

You have the option to link an inspection to all service appointments, all job appointments, and/or all equipment assigned to service appointments. This link is used to add an inspection to the appointment completion validation. Validation levels can be **REQUIRED** or **WARNING**. With REQUIRED, the inspection is required to complete the appointment. With WARNING, a technician can still complete the appointment without the inspection. Setting this up requires updating the link-appointment.js script in the MobileTech with Inspections Woodford project.

1. In MobileTech Administration, select *Tools* > *Launch Resco Cloud Dashboard*.
2. Enter the **Email** and **Password** and select *Log in*.
3. In the left navigation, select **Woodford**.
4. Open the MobileTech with Inspections Woodford project and go to Offline HTML > utility > questionnaire.
5. Select **link-appointment.js** and select *Edit* from the top navigation.
6. In the Links section, enter the inspection name in the validation array based on the validation level (WARNING or REQUIRED). Enter the inspection name as it is in the Questionnaire Designer.
   In this example, the technician will be warned that an inspection hasn't been completed when they attempt to complete the service appointment:

```
servicecall: {
    WARNING: ['Customer Satisfaction Survey'],
    REQUIRED: []
},
```

   In this example, the technician is required to complete the inspection before they can complete the appointment:

```
servicecall: {
        WARNING: [],
        REQUIRED: ['Customer Satisfaction Survey']
    },
```

7. (Optional) If you want to limit to specific value such as a service call type or equipment type, you will need to add the field and field value that will determine if an inspection is needed. Enter the field name as it is the schema. If the field name is a lookup, then add "_name" to the end of the field name. For example, equipmenttypeid_name. See below for information on using a wild card character.
   For example, to limit to a service call type of "AS", you would need to add lines for the field name of "gpcalltype" and the value of "AS".

```
     servicecall: {
         gpcalltype: [
             {
                 value: "AS",
                 inspections: {
                     WARNING: [],
                     REQUIRED: ['Customer Satisfaction Survey']
                 }
             }
         ]
     },
 };
```

8. Save the file.
9. Select *Save*.
10. *Publish* the project.

Using Wild Cards

If you are limiting to a specific value (step 7 above), you have the option to use wild card character functionality. This would provide you with the ability to group similar entities.

The wild card character's default value is %, however, you can edit this by updating the wildCardChar variable value found in utility\questionnaire\link-appointment.js. This wild card character can be used on any field for the service call, job, or equipment.

> ⚠ The wild card character can only be added to the beginning or end of the entity's field value, For example, %AMP SERVICE or AMPSERVICE%. Not allowed would be AMP%SERVICE.

An example of how this might be used so that anything equipment type that ends with AMP SERVICE or anything that has ROOF TOP UNIT with text before or after in the name:

```
equipment: {
    WARNING: [],
    REQUIRED: [],
    equipmenttypeid_name: [
        {
            value: "%AMP SERVICE",
            inspections: { REQUIRED: ["General Amp Service Inspection"] }
        },
        {
            value: "%ROOF TOP UNIT%",
            inspections: {
                REQUIRED: ["General Inspection"],
                WARNING: ["General Inspection for Roof Top Units"]
            }
        }
    ]
}
```

Add Your Logo to an Inspection Report

You can add your company logo to an Inspection Report using Resco's Questionnaire Designer. See https://docs.resco.net/wiki/Questionnaire_Designer#Static_components.

Completing Administrative Tasks and Procedures

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

Access Resco Cloud Dashboard

The Resco Cloud Dashboard is the landing page when you log into your company on Resco Cloud. Access the Resco Cloud Dashboard in MobileTech Admin by going to *Tools* > *Launch Resco Cloud Dashboard*. For more information about the Resco Cloud Dashboard, go to https://docs.resco.net/wiki/Resco_Cloud.

On the Resco Cloud Dashboard, you have access to:

- **Woodford:** Woodford is a browser-based configuration tool for managing MobileTech. It allows you to manage connected mobile devices and to customize versions of MobileTech dedicated to a particular set of users. See Set Up Woodford (page 83) for MobileTech-specific information.
- **Admin Console:** Admin Console is a server administration center used to configure and manage your Resco Cloud server.
- **Sync Dashboard:** The Sync Dashboard provides visibility into synchronization performance by identifying sync errors, sync duration, and metrics like average sync time.

Manage MobileTech Integration User

If you or another administrator forgets the MobileTech Integration User account password, you cannot retrieve the existing password, but you can change it. While the option is displayed to all users under Tools, only an SQL sysadmin can access this window. The password must meet the password policy requirements set up in Resco Cloud and for SQL users.

> Please make sure to write down the new password. The connection strings are now encrypted in the configuration files, so the password can no longer be viewed.

Password is Updated in Multiple Areas

This will update the MobileTech Integration User password in the following areas:

- For the SQL principal 'mobiletech'
- In the config connection strings that have the UserId='mobiletech'
    - MobileTechAdmin.exe.config
      C:\Program Files (x86)\Signature\MobileTech\Admin
    - XrmServer.SyncConsole.exe.config
      C:\Program Files (x86)\Signature\MobileTech\Integration Sync
    - Web.config
      C:\Program Files (x86)\Signature\MobileTech\RescoCloud

Changing the Password

To change the MobileTech Integration User password:

1. In MobileTech Administration, select *Tools* > *Manage MobileTech Integration User*.
2. Enter the new password.
3. Select *Update*.

Manage Resco Administrator Account

If you or another administrator needs to add an administrator account, add/remove access to one or more databases, delete an administrator account, or update an administrator account password, you can do so using the Manage Resco Administrator Account option found under Tools > Manage Resco Administrator Account.

IMPORTANT

- The Manage Resco Administrator Account setup option is available only for users who belong to the SysAdmin role in SQL Server. These users can be Windows or SQL users.
- Only one administrator's password can be changed at a time.
- When changing an administrator's password, you will be changing the password for each company database listed for that account.
- You are required to have at least one administrator account for each company. You can add access to additional company databases later.

Update Access to Databases

1. In MobileTech Administration, select *Tools* > *Manage Resco Administrator Account*.
2. From the Administrator Accounts list, select the account you want to update database access for.
3. Mark or unmark the databases the administrator account should have access to. Mark to add access or unmark to remove access.
4. Select *Save Changes*.

Changing an Administrator Account Password

1. In MobileTech Administration, select *Tools* > *Manage Resco Administrator Account*.
2. From the Administrator Accounts list, select the account you want to change the password for.
3. Complete the following:
    - **Password**: Enter the new password.
    - **Confirm Password**: Re-enter the password.
4. Select *Change Password*.
5. In the Change Password window, select *OK*.

Delete an Administrator Account

1. In MobileTech Administration, select *Tools* > *Manage Resco Administrator Account*.
2. From the Administrator Accounts list, select the account to be deleted.
3. Select *Delete Admin*.
4. Select *OK* to confirm the deletion of the administrator account.
5. In the Delete Admin window, select *OK*.

Add an Administrator Account

1. In MobileTech Administration, select *Tools* > *Manage Resco Administrator Account*.
2. Select *Add Admin*.
3. Enter the following information:
    - **Email**: Enter the password for the administrator account you are creating.
    - **Password**: Enter a unique password.
    - **Confirm Password**: Re-enter the unique password.
    - **First Name**: Enter the first name of the administrator.
    - **Last Name**: Enter the last name of the administrator.
4. Mark the database(s) the new administrator account will have access to.
5. Select *Create*.

Buttons on This Window

- **Delete Admin**: Select to delete the selected administrator from the Administrator Accounts list.
- **Add Admin**: Select to add an administrator to one or more companies.
- **Change Password**: Select to change the password for the selected administrator from the Administrator Accounts list.
- **Save Changes**: Select to save database access changes. This button displays when updating database access for an administrator account.

Monitor Processes and Tasks by Using Integration Monitor

MobileTech Integration Sync monitors changes in the middle-tier database 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 made in Microsoft Dynamics GP. To view changes that are waiting to go into the middle-tier database, in MobileTech Administration, select *Integration Monitor*.

Refresh Specific Lookups

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

> ⚠ 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.

To refresh specific lookups:

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

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 select 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, select *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 selecting a column name from the **Column** drop-down. Enter a partial or whole word and then select *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*: Select 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 select the checkbox to the left of the Service Call/Job column to select all.
8. Select *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, select *Users*.
2. In the *Synced Devices* area, you can see a list of synced devices. For each device, you can see which version of Mobile CRM 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.

Information Processing in Microsoft Dynamics GP

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

Approve/Reject Timesheets

For information on how managers approve timesheet transactions, in the TimeTrack User Guide see Manager Approval of Time Card Transactions[47].

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, select *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 select *Mark All* or *Unmark All* to include or exclude all requests.
   - **Process**: When you finish reviewing a request, select *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, select *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 select the

47. https://wennsoft.atlassian.net/wiki/spaces/sig2025/pages/595842145/Manager+Approval+of+Time+Card+Transactions

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

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

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 select 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, select 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 selecting 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 select *Save*. Close the Role Type Setup window.
        - Select 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 select *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 selecting **Process** or you can select the *Mark All* button and then select *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:** Select this and then select Contact Management to open the Contact Setup window. (This window opens empty, no data automatically fills in this window.)

Process Drop Ship Purchase Order Receipts

A drop-ship purchase order is assigned to a job or service call in the back office. This creates a committed cost on the job or service call. A technician can receive all or part of this drop-ship purchase order when completing the job or service appointment. Note that the technician will need to sync the device after the drop-ship purchase order has been created. After the technician receives the drop-ship purchase order and syncs the device, the drop-ship purchase order receipt is sent back to the server. To process the receipt, the purchasing batch MOBILEYYMMDD (year, month, day) will need to be posted from the Purchasing Batch Entry window.

- Receive Items in MobileTech From a Drop-Ship Purchase Order (page 130)
- Processing the Drop-Ship Purchase Order Receipt (page 131)

Receive Items in MobileTech From a Drop-Ship Purchase Order

After drop-ship purchase orders are committed for a job or service call, you can use the **PO Receipts** pane to receive items from purchase orders. You can also receive partial shipments.

1. Select **Appointments**. Select an appointment and select **Complete**.
2. Select the **PO Receipts** tab to display the receipts that are processed and assigned to the appointment. (Processed receipts are not editable.)
3. To view all receipts available for the service call or job, but not assigned to the appointment or processed, select the **Refresh** icon in the top right corner. These receipts will be available on your device until you sync the device.
4. Select an unprocessed purchase order receipt to open the PO Receipt pane. (An unprocessed receipt displays as Processed: No.)
5. Enter information in these fields, as necessary. (*Required field)
    - **PO Number**: The purchase order number for the job appointment. You can't change this value.
    - **Vendor**: The vendor that is associated with the appointment and purchase order. You can't change this value.
    - **Processed**: Displays Yes or No to indicate if you received items that are listed on the purchase order receipt.
    - **Service Call**: The appointment number associated with the purchase order. You can't change this value.
    - **Transaction Date***: The date when the purchase order items were received. The current date is displayed by default, but you can change it.

- **Freight Amount**: You can optionally enter the freight charges for items on the purchase order from the invoice.
- **Misc Amount**: You can optionally enter the miscellaneous charges for items on the purchase order from the invoice.
- **Vendor Doc#***: Enter a number or identifier for the vendor document. For example, you could enter the number of the packing slip or other information that might be included with the shipment.

6. Select the **Receipt Detail** bar to display the **PO Receipts line detail** list, where the line items are displayed for the purchase order receipt.
    - To receive all items for all line items, select **Receive All** to mark the **Received** checkbox for each line.
    - To receive items for only one line, select the line and toggle **Received** to *Yes*.
7. If the quantity of items that was delivered differs from the quantity that was originally on the purchase order, you can change the value in the **Quantity** field to reflect the number of items that were delivered. The number of delivered items can be less, the same, or more than is indicated on the purchase order. After the purchase order receipt is synced, you can't change the quantity. To process the remainder of the items, you must again select the **PO Receipt** tab and select the sync icon to view the purchase order and receive the remainder of the order.
8. Select the **Save** icon.
9. On the next device sync, the receipt is sent to the back office.

Processing the Drop-Ship Purchase Order Receipt

Once the device syncs, the receipt is sent back to the server. The back office can now post the batch from the Purchasing Batch Entry window. For more information on posting the batch, see *Using Microsoft Dynamics GP Purchase Order Processing* in the Service Management and Job Cost User Guides.

1. In Microsoft Dynamics GP, go to Transactions > Purchasing > Purchasing Batches.
2. In the Purchasing Batch Entry window, use the **Batch ID** lookup to select the drop-ship purchase receipt in the MOBILEYYMMDD batch.
3. To print the Edit List, select *Print* from the menu bar.
4. To post the batch, select *Post* from the menu bar.

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.

Field Invoice Restrictions

Field invoices created in MobileTech have the following restrictions in Service Management:

- Regardless of the Invoicing with Cost Options in Invoice Options *(Setup > Service Management > Invoice Setup > Invoice Options)*, 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.

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 are 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[48] in the MobileTech Help. For information about how to process invoices and payments in the host system, see the Service Management documentation.

Process Inventory and Non-Inventory Item Transactions

Use the Mobile Inventory window to process inventory transactions that are entered by technicians. All transactions that are displayed are processed at the same time.

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.

48. https://wennsoft.atlassian.net/wiki/spaces/mt2025/pages/579148454/Field+Invoices+and+Customer+Payments

1. In Microsoft Dynamics GP, select *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 select *Delete*.
2. Select *Process* to process the transactions.

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, select *Print*.

Process Purchase Orders in Service Management and Purchasing

A purchase order that is entered in MobileTech or Schedule must be reviewed, committed, and processed in Service Management and Microsoft Dynamics GP Purchasing before costs that are associated with the purchase order can be processed in the system. The user who is processing these purchase orders must be a Microsoft Dynamics GP Full User.

> ⚠ To allow users in MobileTech or Schedule to quickly work and provide information to customers in the field, purchase orders for service invoices and field invoices do not include taxes unless the invoices have been received in the Purchasing module of Microsoft Dynamics GP.

- Process Purchase Orders (page 133)
- Buttons on this window (page 134)
- Post Purchase Orders in Microsoft Dynamics GP (page 134)

Process Purchase Orders

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. You can use the zoom functionality to display the appropriate setup window. For example, zooming on the service call number will open the Service Call window.

To view and process purchase orders that were sent from MobileTech or Schedule:

1. In Microsoft Dynamics GP, select *Inquiry* > *Service Management* > *Mobile Purchase Order Inquiry*.
2. The Mobile Purchase Order window displays the following information that was entered on the purchase order:
   - **Service Call/Job Number:** Displays the service call ID or job number.
   - **Appointment:** Displays the appointment ID.
   - **Technician:** Displays the technician.
   - **PO Number:** Displays the purchase order number.
   - **Line Number:** Displays the line number of the item entered on the purchase order.
   - **Date:** Displays the date the purchase order was created in MobileTech or Schedule.
   - **eConnect Error:** If an error occurs, the eConnect Error number is displayed in the purchase order row as a hyperlink that you can select to view the error message. The error information is included on the Mobile Purchase Order report that is available from the Print button.
   - **Vendor/Vendor Name:** Displays the Vendor entered on the purchase order.
   - **U of M:** Displays the item's unit of measure.
   - **Item Number/Item Description:** Displays the item number and description.
   - **Quantity:** Displays the quantity of the item.
   - **Unit Cost:** Displays the unit cost of the item.
   - **Cost Code:** Displays the cost code. (service appointments).
   - **Job Cost Code:** Displays the Job cost code (job appointments).
   - **Site ID:** Displays the Site ID.

- **Product Indicator:** Displays Job Cost or Service, depending on the origin of the purchase order (job or service call).
- **Billing Amount:** Displays the billing amount.
- **Invoiced:** Indicates if the purchase order was invoiced.

3. Select the transactions from MobileTech to process and select *Process*.

Buttons on this window

- **Mark All:** Select mark all checkboxes in the Process column.
- **Unmark All:** Select to unmark all checkboxes in the Process column.
- **Process:** Select to process the marked transactions.
- **Redisplay:** Select to update the list of purchase orders that were submitted by technicians.
- **Save:** Select to save any changes made to the purchase orders. This option does not process the purchase orders.
- **Delete:** Select to delete a record. After selecting Delete, you will be prompted to Delete or Cancel.
- **Cancel:** Select to close the window. You will be prompted to save any changes.
- **Print:** Select to print the Mobile Purchase Order report, which displays information about the purchase orders that need to be processed. This report also includes error code information.

Post Purchase Orders in Microsoft Dynamics GP

1. To post purchase order transactions in Microsoft Dynamics GP that originated from MobileTech or Schedule, in Microsoft Dynamics GP, select *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. Select *Commit*. Purchase orders that are committed are available in MobileTech so that technicians can enter purchase order receipts for inventory items.

Troubleshooting

Callback Error

Description: Your technicians are receiving a Callback Error when attempting to sync after you've upgraded MobileTech.

Solution: Have the technician delete data, then re-sync the device. If MobileTech continues to behave oddly, then the app needs to be uninstalled and reinstalled.

Certificate Authority is Invalid or Incorrect

Issue: You are attempting to connect the Windows App Store version of Mobile CRM and Secure Sockets Layer (SSL). The error message you are receiving is “Can’t connect. The text associated with this error code could not be found. The certificate authority is invalid or incorrect.”

Solution: You must get a certificate from a valid certification authority.

Database Upgrade '{org}' Version 38 to Version 39 Failed

Description: When upgrading to MobileTech from an older version, some users have received the following error message:

Database upgrade '{org}' version 38 to version 39 failed:
****

Exception: System.InvalidOperationException
Id: 0f9a60f4-3e80-4344-ad04-8b96f04c63d5
Message: Unable to update attribute 'resco_mobiledevice.resco_ownerid': Specified type 'UniqueIdentifier' does not match attribute 'resco_mobiledevice.resco_ownerid' type 'String'!
Source: XRMServer.Data

> IMPORTANT
>
> If you attempted to upgrade before performing these steps when it was required, it is advisable to restore *rescoxrm_config* and the {org}_RESCOXRM database(s) and start over.

Solution:

Step 1: Check for an Existing Issue of Previously Non-updated Resco Base Column Attributes

A type of 1 indicates the problem exists.

In SQL Server Management Studio, run the following against the {org}_RESCOXRM database:

```
select type from metadata$attribute where entityid = (select id from
metadata$entity where name = 'resco_mobiledevice') and name = 'resco_ownerid'
```

Step 2: Set the Metadata Attributes to What They Should Be

In SQL Server Management Studio, run the following against the {org}_RESCOXRM database:

```
/* Upgrade the table to good condition */
```

```
ALTER TABLE [resco_mobiledevice] ALTER COLUMN [resco_ownerid] UNIQUEIDENTIFIER
```

```
update metadata$attribute set type = 0 where entityid = (select id from
metadata$entity where name = 'resco_mobiledevice') and name = 'resco_ownerid'
```

Step 3: Perform an IISRESET as an Administrator

To run the IISRESET:

1. Select the Windows Start icon.
2. In the search box, type **cmd**.
3. Right-click on cmd.exe and select *Run as administrator*.
4. At the command prompt, type **IISRESET**.
5. Press *Enter*.
6. When *Internet services successfully restarted* appears, type **exit**.
7. Press *Enter*.

Labor Sync Errors

These are some of the common Labor Sync Error messages that your technicians may receive when syncing their devices. Use the table below to troubleshoot and fix these errors.

A valid labor rate does not exist for this position/pay code or department/ position/pay code combination.

Description: This error displays when the labor rate group combination assigned to the Customer is not set up with the pay code the technician was using. Labor Rate Groups must be configured with the proper combination of position, department, and pay code for Labor to be transacted successfully. If the technician uses one of these pay codes that has not been configured correctly they may see this particular error message preventing them from syncing.

Solution: Adding the appropriate Labor Rate Group combination will resolve this sync error.

The service call entered is either missing or closed. Enter another service call ID.

Description: This error displays when there is stale data on the device. If a technician is getting this error, the back office has likely deleted or closed the service call that the technician is trying to enter labor towards.

Solution: A DELETE DATA from the device should clear this old data from the device and resolve this sync error.

This batch is marked to be committed and cannot be edited.

Description: This error displays when the batch is marked for processing Payroll Posting.

Solution: The TimeTrack or Payroll batch will need to be unmarked for the technician to be able to sync successfully.

The fiscal period for this date is not part of a fiscal year. Enter a new date.

Description: This error is due to the technician entering a Labor transaction that has a “week-ending” day in a fiscal year that is not currently open. This is a common error that occurs for technicians in the last week of the year that is due to the upcoming Fiscal Year not being open yet. To check if the current or next fiscal year is open, go to Microsoft Dynamics GP > Tools > Setup > Company > Fiscal Periods to open the *Fiscal Period Setup* window.

Solution: Opening the Fiscal Period will allow the Technicians to sync this Labor successfully.

This cost code does not exist. Enter another code.

Description: This error states the Cost Code used in the transaction does not exist or does not match the system data. This could translate to data mismatches or stale middle-tier data.

Solution: Adding, updating, or re-loading (Load Data) the Cost Code data for the transaction will resolve this issue.

Unknown error number XXXXX.

Description: This particular error is due to the system ERROR tables (SVERRORS, WSERRORS, JCERRORS) being empty in the company database. TimeTrack requires these tables to be populated. This can sometimes happen after a Signature upgrade where the Signature Utilities program was not launched as an Administrator.

Solution: Re-populating these tables should resolve this issue and Technicians can resync to push the transactions through to the host system.

License Errors

LICENSE: NOT FOUND

Description: This error displays when the user's license has been disabled, you have exceeded your licenses, or you have not cleaned up deleted technicians still consuming a license count. For more information, see https://docs.resco.net/wiki/Mobile_users .

Solution:

1. In MobileTech Admin, go to Tools > Launch Resco Cloud.
2. Select **Woodford**.
3. Go to **Mobile Users** under the left *Administration* pane.
4. On the far right pane, the available licenses display.
    - If you have any **(DELETED)** users displayed in the center pane, select one or more (by holding CTRL and selecting). Toggle the license to *Delete*.
    - If you have users consuming a license that should be removed, select one or more and then toggle the license to Disable. Then toggle to Delete.
    - Resco's best practice recommends disabling and then deleting any users who are no longer consuming a license.

This organization is disabled, or the trial has expired.

Description: This error message displays when logging into Resco Cloud/Woodford for one of the following reasons:

- The organization is disabled.
- The organization licenses are expired.
- There are no available licenses.

Solution: While you may need to contact WennSoft Support, the first thing to check is if you have deleted users in the Mobile Users window in Woodford and removed those users. See solution steps for the LICENSE: NOT FOUND error message (above). If your organization is disabled and/or the licenses are expired, please contact WennSoft Support.

Microsoft Distributed Transaction Coordinator Fails

Microsoft Distributed Transaction Coordinator (DTC) fails or DTC transactions fail.

Description: If your company is spinning up servers from the same Azure templates, specifically spinning up SQL and MobileTech app server from the same template, in some, or possibly all, circumstances, Microsoft Distributed Transaction Coordinator (DTC) will fail. You can catch this specific problem if you ever suspect it is happening (usually when you have confirmed no firewall issues, no non-domain DMZ comm issues, and that components service options have been set), by running DTCPing between both servers. Usually in the log that CID warning will appear.

Solution: Uninstall and reinstall DTC on either machine (usually safest to do on the App server). We recommend that you utilize the Powershell cmdlets for uninstall-dtc and install-dtc to do the uninstall/re-install.

1. To start a Windows PowerShell session in a Command Prompt window, **type PowerShell**.
2. In Windows Powershell, run the following commands:
    a. **Cmdlet to uninstall DTC**
       Uninstall-Dtc -Confirm:$false
    b. **Cmdlet to install DTC**
       Install-Dtc -LogPath "C:\Windows\system32\MSDtc" -StartType AutoStart
    c. **Cmlet to configure DTC**
       Set-DtcNetworkSetting -DtcName "Local" -RemoteClientAccessEnabled:$true -RemoteAdministrationAccessEnabled:$true -InboundTransactionsEnabled:$true -OutboundTransactionsEnabled:$true -AuthenticationLevel NoAuth -Confirm:$false
3. Restart IIS and the DTC service. You may need to reboot the app server.

MobileTech with Inspections Validate Failed Error

Description: I downloaded and installed MobileTech, but I received a Validate Failed error message when I tried installing the base Inspections Woodford Project (MobileTech with Inspections 10-0-xx) as a top-level project.

Validate Failed error message: TypeError: Cannot read properties of undefined (reading ('startsWith').

Solution: The installation process for the MobileTech with Inspections Woodford project has changed with MobileTech 2024 (10). Please see the updated instructions at Create the Child Project and Import the MobileTech with Inspections Woodford Project (page 23).

Unable to Load Service Call Details Error

Description: Full message: “Unable to load service call details. Contact your administrator to load data and resync the device. Service Call: *gpservicecallid”*

Solution: This message that a technician might receive indicates that the service call is not in the middle tier. You will need to load data for that technician in MobileTech Admin, verify the service call is in the middle tier, and then have the technician sync their device.

User 'xxx@xxx.com' is missing 'Read' privilege for 'mobileproject_role' entity on organization 'XXXX'

Description: After upgrading, we cannot get any of the Client devices to sync and download the current Woodford Project.   The Client authenticates successfully and starts syncing, but ends in the following error.

```
<EXCEPTION>14:45:07.721: Customization download failed
Net.RescoSoapException: Server Error: Attempted to perform an unauthorized operation.
User is missing privilege for entity on organization.
<soap>Code=500| ErrorCode=-2147220873| Reason=UnauthorizedAccessException|
Detail=Attempted to perform an unauthorized operation. User 'xxxxx@xxxx.com' is missing
'Read' privilege for 'mobileproject_role' entity on organization 'xxxx'.|
SupportId=5d424a0e-0e70-4f87-9df0-6d1df9809647</soap>
   at WebServiceBase.ThrowSoapException(HttpException ex)
```

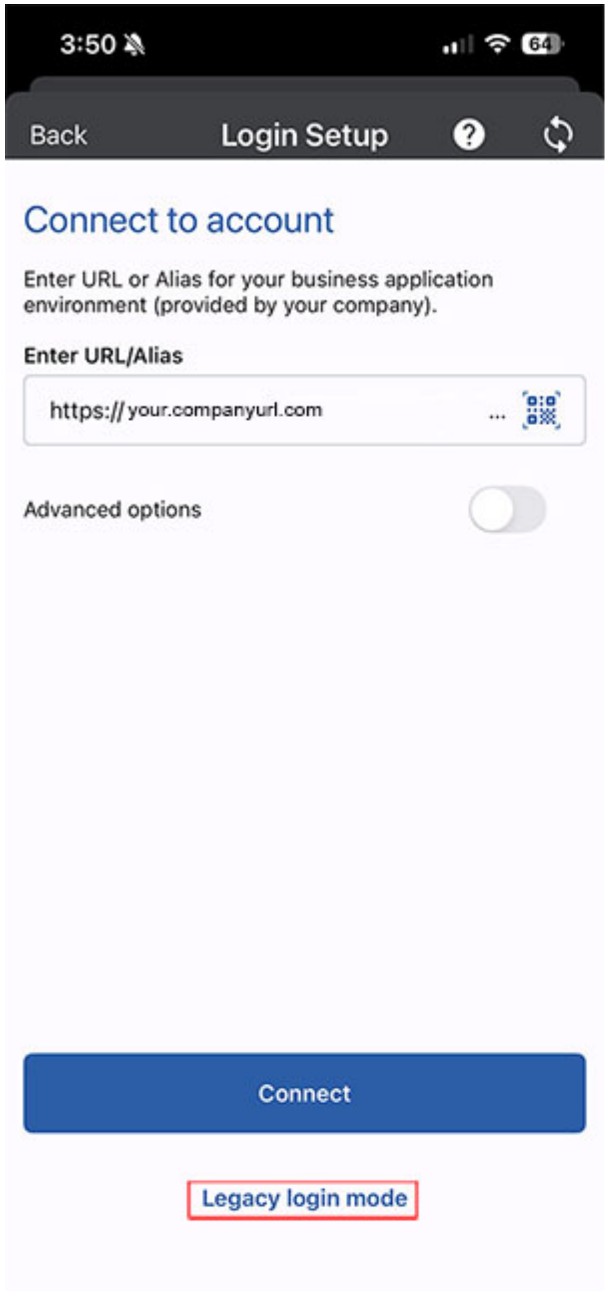
Solution: This is due to a custom role within MobileTech. For a script that will correct this issue, please contact WennSoft support at support@wennsoft.com[49] or you can call 262-317-3800.

Resco's New Login Experience

Legacy Login Mode

When logging into the Resco’s new login experience (October 6, 2025 app update) users see a new login window. To continue using the regular login, select **Legacy login mode** at the bottom of the Login Setup window.

49. mailto:support@wennsoft.com



Changing the CRM User Email Address

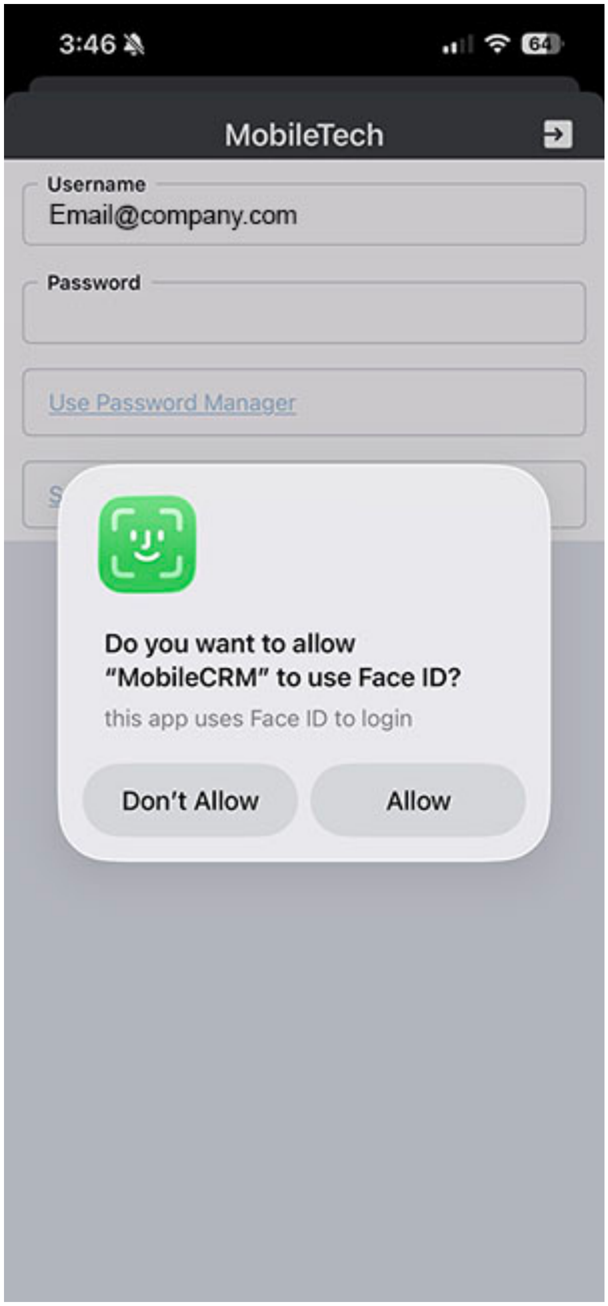
If you are logging into a device and need to change the CRM user login email address, you can do this by tapping the current email address.

1. In MobileTech, select **Setup** > **Resco Setup**.
2. Select the current user email address hyperlink.
3. Replace the email address in the **User Name** field with your email address.
4. Enter your **Password**.
5. Select the **Sync** icon.

Biometric Login

Unlock your Resco Mobile CRM using biometrics (if your device and company policy support the feature).

1. In MobileTech CRM, go to **Setup**.
2. Toggle **User Fingerprint** to **On**.
3. The next time you log in, you are prompted if you want to allow **MobileCRM to use your fingerprint or Face ID to login**. The option for fingerprint or Face ID is dependent on your device.
4. Select **Don't Allow** or **Allow**.



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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