WennSoft

Signature

Signature Agent 2024

Installation and Administration Guide

Exported: 12/02/2024

Legal Declarations

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Requirements and Compatibility

Requirements

External Address and Port

The external address and port must not be blocked. This is required for Signature Agent communication.

`appservice-01.act.key2act.io:58100`

Event Trigger Notifications

Event trigger notifications are set up within two applications:

Signature Agent

See Completing Signature Agent Configuration (page 4) for additional information.

- For standard communication, Signature Agent contains the event notification setup.
- For advanced communication, Signature Agent contains the company information including the logos and accent color for the HTML email.

Schedule

In Schedule, see Setting Up Technicians in Schedule (page 22).

- For standard communication, Schedule contains the technician's information including the technician/customer's email address.
- For advanced communication, Schedule contains the technician's information including the technician's position, email address, and photo in the HTML email.

Common Language Runtime (CLR)

NET Framework CLR must be enabled in SQL Server. The Signature Agent uses a CLR assembly that executes with permissions set to "SAFE".

To enable this, in SQL Server run this command:

```
EXEC sp_configure 'clr enabled', 1;
```

```
RECONFIGURE WITH OVERRIDE;
```

Compatibility

Signature Agent 2.5 is compatible with the following.

Signature

- Schedule 4.7 or higher
- 2018 R7 (18.05b07) or higher
- 2018 R6 (18.04b06)

Transfer Layer Security (TLS)

Server Protocols

- TLS 1.2

Client Protocols

- TLS 1.0 (currently required)
- TLS 1.1
- TLS 1.2

Installing Signature Agent Configuration

1. Right-click **Signature Agent 2.x.x.exe** and select *Run as administrator*.
2. If prompted with the User Account Control window, select *Yes* to allow the program to make changes to the computer.
3. On the **Welcome to the Signature Agent Setup Wizard** window, select *Next*.
4. On the **End-User License Agreement** window, review and accept the terms of the license agreement, and then select *Next*.
5. On the **Select Installation Folder** window, accept the default installation location C:\Program Files (x86)\Signature\Signature Agent or use the *Browse* button to select a different installation location, and then select *Next*.
6. On the **Ready to Install** window, select *Install*.
7. On the **Completing the Signature Agent Setup Wizard** window, select *Finish*.

⚠ If the standard event trigger and Advanced Comm trigger emails are not reflecting the correct time, this can fix this by launching Signature. Then go to Microsoft Dynamics GP > Tools > Settings > Service Management > Module Setup > Setup Options. In the Setup Options window, click *OK*.

This is happening because the appointmentview relies on the K2ACDC.setupoption record to exist in the K2ACDC.setupoption table. This table contains the Time Zone View setting so if the record is not there, it reverts to TZV=False. By performing the step above of launching the Setup Option window and clicking OK creates a record in the table and then the email times will be reflected accurately.

Upgrading Signature Agent Configuration

IMPORTANT

Prior to upgrading

- Do not uninstall your previous version of Signature Agent before upgrading as data from the original installation is used. The previous version can be uninstalled after upgrading.
- Document any additional CDC Configuration triggers that have been enabled as these may be disabled after upgrading.

Upgrading Signature Agent

1. Right-click **Signature Agent 2.x.x.exe** and select *Run as administrator*.
2. If prompted with the User Account Control window, select *Yes* to allow the program to make changes to the computer.
3. On the **Welcome to the Signature Agent Setup Wizard** window, select *Next*.
4. On the **End-User License Agreement** window, review and accept the terms of the license agreement, and then select *Next*.
5. On the **Select Installation Folder** window, accept the default installation location C:\Program Files (x86)\Signature\Signature Agent or use the *Browse* button to select a different installation location, and then select *Next*.
6. On the **Ready to Install** window, select *Install*.
7. On the **Completing the Signature Agent Setup Wizard** window, select *Finish*.

If the standard event trigger and Advanced Comm trigger emails are not reflecting the correct time, this can fix this by launching Signature. Then go to Microsoft Dynamics GP > Tools > Settings > Service Management > Module Setup > Setup Options. In the Setup Options window, click *OK*.
This is happening because the appointmentview relies on the K2ACDC.setupoption record to exist in the K2ACDC.setupoption table. This table contains the Time Zone View setting so if the record is not there, it reverts to TZV=False. By performing the step above of launching the Setup Option window and clicking OK creates a record in the table and then the email times will be reflected accurately.

After Completing the Upgrade Steps

- Uninstall the Previous Version of Signature Agent (page 4)
- Uninstall/Install Service in Signature Agent (page 4)
- Verify Trigger Status (page 4)

Uninstall the Previous Version of Signature Agent

When upgrading to Signature Agent 2.x.x from a previous version, you will need to uninstall the previous version using Windows Add/Remove Programs.

Uninstall/Install Service in Signature Agent

In Signature Agent, you will need to uninstall and then reinstall the service for each company.

1. Launch Signature Agent Configuration.
2. From the button bar, select *Uninstall Service*.
3. Select *OK* in the Success pop-up window.
4. Select *Install Service*.
5. Select *OK* in the Success pop-up window.

Verify Trigger Status

1. In Signature Agent, on the Home tab, expand each company.
2. Select either Event Triggers or Advanced Comm Triggers to view the triggers.
3. Verify that the triggers that were enabled prior to upgrading are still enabled.

Completing Signature Agent Configuration

Launch Signature Agent Configuration

This is the user interface that is used to configure the CDC and Event triggers.

1. Launch Signature Agent Configuration.
2. On the Login window, enter the following information:
    - SQL Instance
    - Authentication
    - Login
    - Password
3. Select *Login*.
4. The Signature Agent Configuration is divided into two tabbed sections:
    - **Home:** The Home tab is where Signature Agent is configured.
    - **CDC Configuration:** The CDC tab is used to set up the CDC for the database for capturing state changes to the database tables.

Set Up Change Data Capture (CDC) Configuration

Create the CDC change options on the CDC Configuration tab.

1. In Signature Agent Configuration, select the **CDC Configuration** tab.
2. In the **Name** column, expand the Dynamics GP database.
3. Select the company database.
4. Select *Create Objects* to create the CDC change options that are listed on the right side of the window.

5. The following entities are available:
    - Appointment
    - Equipment
    - GP Customer
    - Job
    - Job Cost Code
    - Location
    - Service Call
    - Service Option
    - Technician
6. To enable an entity, select the entity name and then select **Start** from the menu bar. For example, enable Job to track changes to the job tables for job appointments. To disable an entity, select **Stop** from the menu bar.
    - Enabled entities are indicated with a green checkmark icon.
    - Disabled entities are indicated with a red square icon.

Configure Signature Agent

Each company that will be used with Signature Agent Configuration will need to be set up by associating the company to a Signature Agent Service that will be monitored for changes.

1. On the **Home** tab, create a new company by choosing *New Company* or select an existing company.
2. From the menu bar, select *Properties*.
3. In the Edit Company Connection window, complete the following tabs:
    - Database
    - Access
    - Company Info
    - Advanced Comm - This tab only displays if you have purchased Advanced Communications.
    - Dispatcher Email
    - Maintenance
4. After you select the OK button to save changes made to any of the tabs in the Edit Company Connection window, you will need to restart the Service. A pop-up window displays to remind you to complete this step. You can do this by selecting the *Restart* button from the button bar is Signature Agent or in the Properties window by selecting the Agent Service drop-down and then select *Restart Service*.

    Select *OK* on each tab to save changes.

Database Tab

Enter the company database settings.

1. Select the **Database** tab.
2. Enter the **Company Name**. This is only used for the display name in the Tenant tree to the left.
3. Enter the **Database Name** or select *Browse* and then select the company database.
4. Enter the database **Username** and **Password**.
5. Select *Test Connection* to verify that the database settings are correct and can connect to the database. You will be prompted to save the settings prior to the test running.
6. The Access Key is generated at this time and can be found on the Access tab.
7. Select *OK*.

Access Tab

Enter the Email Alias to create the email address that your customers will use when sending an email to create a service call. This email alias is also used as the "Sender" when sending communications to your customers and technicians. For example, if you create an alias of Fabrikam, your customers would send an email for a service to fabrikam@servicerequests.io.

1. Select the **Access** tab.
2. Select *Show* to view the Incoming Access Key and the API Key.
    - The **Incoming Access Key** is generated by the database once the company is saved prior to testing the configuration. This key is used as a unique identifier.
    - The **API Key** is automatically generated from WennSoft.
3. Enter the **Email Alias**. This is the email address that notifications are sent from when sending notifications.
4. You can select the Agent Service drop-down to perform the following service options. These options are also available from the menu bar on the Home tab. Customer Support may direct you to perform these steps during troubleshooting.
    - Install Service
    - Uninstall Service
    - Reinstall Service
    - Restart Service
5. Select *OK*.

Company Info Tab

1. Select the **Company Info** tab.
2. Enter the company information that can be included in some of the communications to your customers.
    - Company Name
    - Company URL
    - Address
    - City
    - State
    - Zip
    - Phone Number
    - Email
3. Select *OK*.

Advanced Comm Tab

1. Select the **Advanced Comm** tab.
2. Complete the following fields:
    - **Header Logo**: Select *Upload* and then navigate to the location of your logo and select OK. The maximum width for the logo is 185 pixels.
        - Select Preview to view the logo.
        - Select Delete to remove the logo.
    - **Footer Logo**: Select *Upload* and then navigate to the location of your logo and select OK. The maximum width for the logo is 185 pixels.
        - Select Preview to view the logo.
        - Select Delete to remove the logo.
    - **Accent Color**: Select the **Accent Color** drop-down. You can select between *Custom*, *Web*, or *System* tabs for choosing or entering the color that will display at the top and bottom of the email.

3. Select *OK*.

Dispatcher Emails Tab

This section is used for selecting which email addresses to receive service call updates. The email addresses displayed are set up in the User Roles section of Schedule Administrator Settings. See *Working with Roles* in the Schedule User Guide.

1. Select the **Dispatcher Emails** tab.
2. Mark the email address checkbox(es) to indicate where notifications of service call updates should be sent.
3. Select *OK*.

Maintenance Tab

This section is used for setting up a Maintenance Schedule. The **Next Scheduled Eventing Pause** is used to stop Signature Agent from accessing the database. This allows you to perform database maintenance without generating CDC records that might generate communications.

1. Select the **Maintenance** tab.
2. Select *Edit*.
3. In the Eventing Schedule Editor window, create an optional schedule to pause the Eventing Engine.
    a. Select **Weekly** or **Monthly**.
        - **Weekly** - Select the day(s).
        - **Monthly** - Select the day number and the frequency.
    b. Select the **Time of Day** and **Frequency**.
    c. Enter the **Duration (Hours)**.
4. Select *Preview* to view what the next 10 occurrences would be based on the setup. Select OK to return to the Eventing Schedule Editor.
5. Select *OK*. The Tenant tree now displays the company and automatically creates **Event Triggers**.

View the Log File

Select *View Event Log* from the menu bar to view the log.txt file that displays information about trigger events and also denotes when issues occur. For example, an email for service was received and a response is sent out.

Optional: Remove JOIN to Table SV000805

Some users have experienced a query timeout with the JOIN to the SV000805 (Note) table. By eliminating this JOIN, query performance is significantly improved from taking minutes to run to now only seconds.

If you are not using the Service_Desc_Note field (long note description) when defining standard or advanced communication event emails, we recommend that you manually set "ExcludeNotes" to "true" to remove the JOIN.

To remove the JOIN to table SV000805:

1. Go to C:\Program Files (x86)\Signature\Signature Agent.
2. Right-click on SignatureAgentService.exe.config and select Edit.
3. Change the value to "true" for the following line:
```
<add key="ExcludeNotes" value="false"/>
```
4. Save the file.

Working With Event Trigger Notifications

The event triggers are automatically created for the company after testing the connection and are based on the CDC table views. These notifications can be enabled or disabled based on the customer's communication requirements. You can send the email notification in Schedule from the appointment window or by right-clicking the appointment and then choosing *Notify Customer*.

> ⚠ Only users with Advanced Communications (page 34) can send out HTML emails and use the Notify Customer button in Schedule.

There are 9 default standard triggers that are created during the installation:

- Appointment-AppointmentCanceled
- Appointment-AppointmentCreatedAndScheduled
- Appointment-AppointmentReassigned
- Appointment-AppointmentRescheduled
- Appointment-AppointmentScheduled
- Appointment-TechnicianArrived
- Appointment-TechnicianCheckedOut
- ServiceCall-ServiceCallCreated-2016+ - Email that is sent to your customer if they are using Signature 2016 or higher when a service call is created.
- ServiceCall-ServiceCallCreatedByEmail-2016+ - Email that your customers are sent after a service call is created from an email request from your customer.

Standard event trigger notifications are set up within two applications:

- **Signature Agent Configuration** contains the event notification setup. See Completing Signature Agent Configuration (page 4).
- **Schedule** contains the technician information including the technician/customer email address. For more information, see Setting Up Technicians in Schedule (page 22).

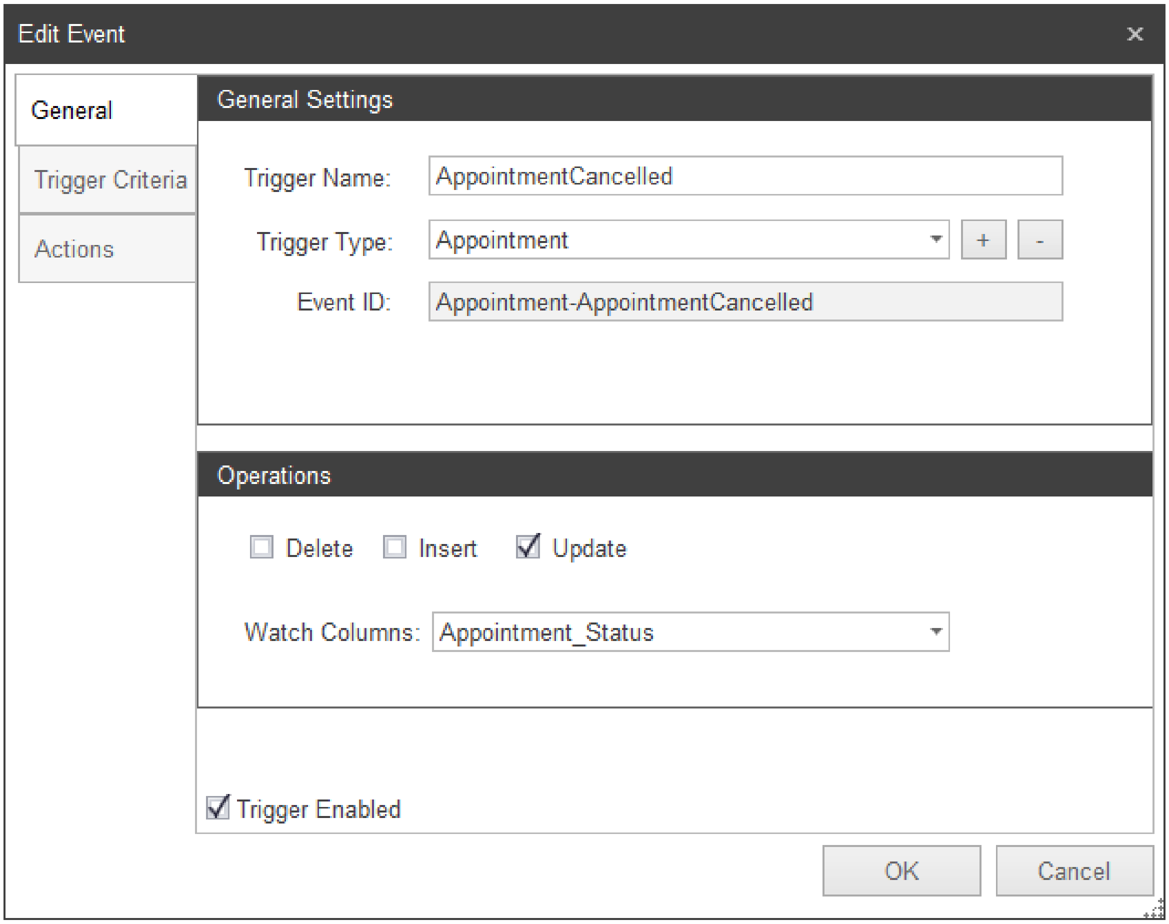
Working With Event Triggers

Editing an Existing Event Trigger

1. To view the properties on the triggers, select an event trigger and then select **Properties** or double-click the event trigger.
2. In the Edit Event window, the *General* tab displays the General Settings and Operations.
    - **Trigger Name**: Indicates that any time a service call is created, this event will be active.
    - **Trigger Type**: Displays a list of active CDC tables.
    - **Event ID**: This display-only value is a concatenation of the "Trigger Type - Trigger Name".
    - **Operations**
        - Mark the operation (Delete, Insert, and/or Update) to occur in the CDC table view when the trigger is activated. Depending on the trigger type, additional choices are available in the Operations section.
        - Select the Watch Columns drop-down to display a multi-select list where you can select the columns that need to be watched in the CDC table view.
    - The **Trigger Enabled** checkbox indicates that the trigger is in use.

    In the example below, the Appointment-AppointmentCancelled trigger event properties are displayed. This trigger is set up to send an email when an appointment status is set to "Cancelled".
    - The Operation is set to watch the CDC table for updates to the Appointment_Status column.

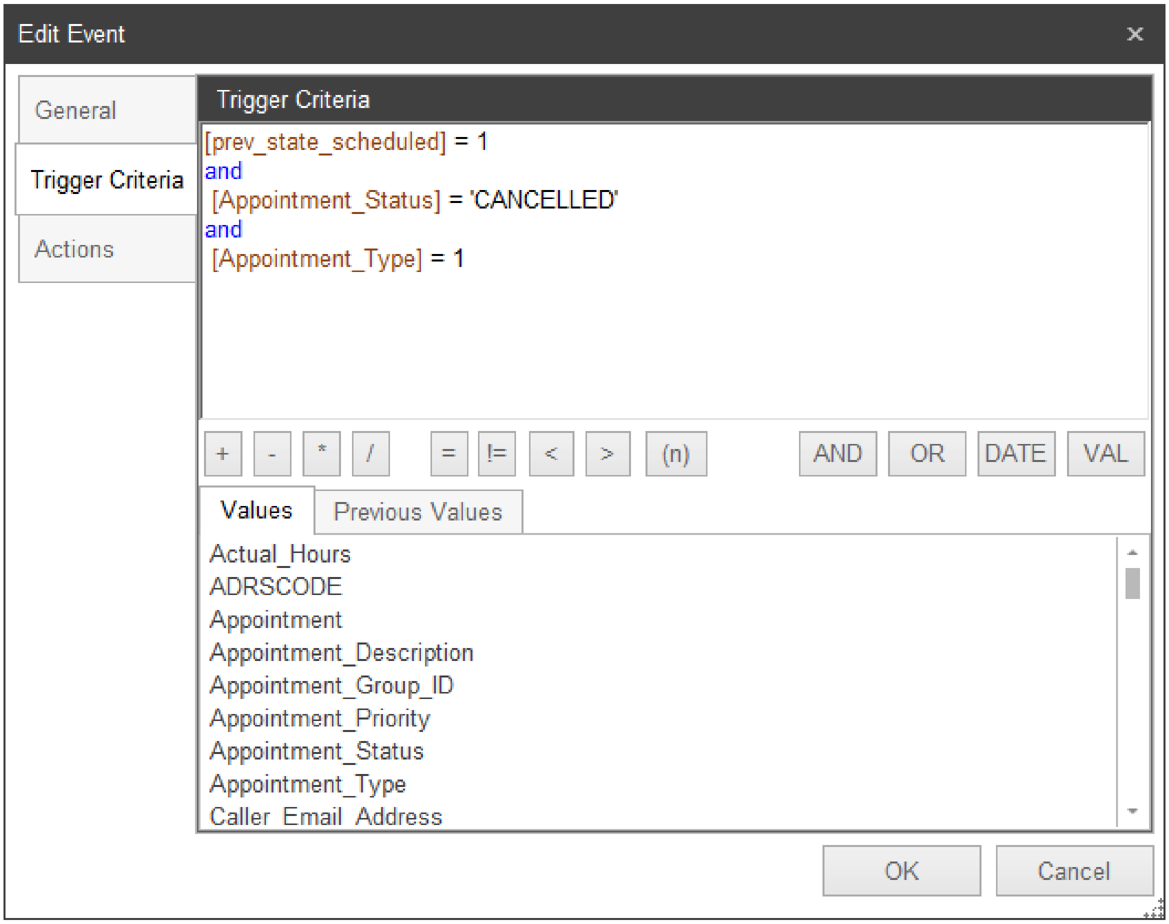
      Click to view screenshot.



3. The *Trigger Criteria* tab is used to set up specific criteria that may need to be met for the trigger to activate. Use the Values and Previous Values tabs and the formula buttons to create the trigger criteria. To enter the values necessary for the formulas, select the VAL button and enter the data.

   For the example below, continuing to the Trigger tab for the Appointment-AppointmentCancelled trigger event, we are looking at the Trigger Criteria. Note that all of the criteria are joined with an AND which indicates that all three criteria must be met to activate the trigger. If a criteria is joined with an OR, this indicates that either the previous criteria line or the following criteria line must be met.
   - The Previous Scheduled State (prev_state_scheduled) in the CDC table must be 1.
   - The Appointment Status must be CANCELLED.
   - The Appointment Type must be 1.

   Click to view screenshot.

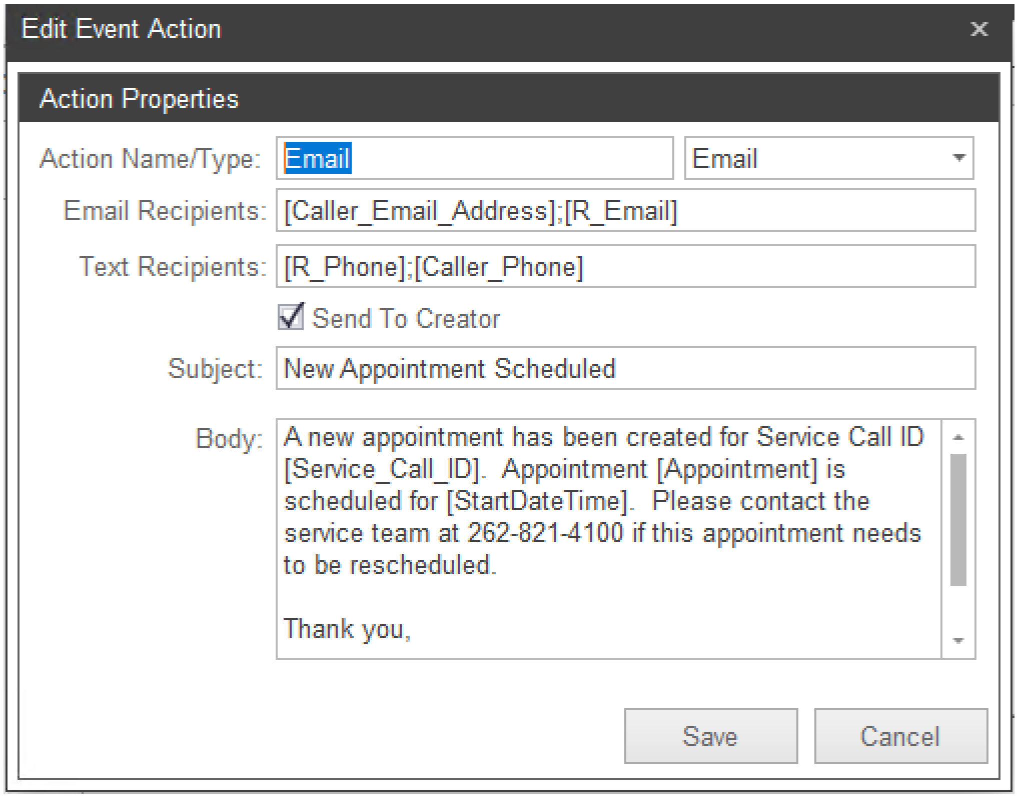


4. The *Actions* tab displays the action properties. The initial display is what is currently out-of-the-box setup and includes the **Name** and **Action Type**. This information is fully editable. Select *New* (to create a new Action) or *Edit* (to edit an existing Action) to display the Action Properties window.
   - **Action name/Type**: View or edit the action that happens when the event is triggered.
   - **Email Recipients**: If additional recipients need to receive the email, enter the email address values here. The information used for the values that have been set up in Signature.
     - **Caller email address**: Stored in the Service Call window [Caller_Email_Address].
     - **Technician email address**: Stored in Schedule Resources window [R_Email].
   - **Text Recipients**:
     - **Caller phone**: Stored in the Service Call window [Caller_Phone].
     - **Technician cell phone**: Stored in Schedule Resources window [R_Phone].
   - **Send to Creator**: If marked, the creator will also receive email communication when the trigger is creating a service call via an incoming email.
   - **Subject**: Displays what the subject line will contain.
   - **Body**: Displays what the body of the message displays. Different parameters can be selected by right-clicking and then choosing currently-available values from the current record or you can select previously-used values.

   In the following example, three emails and two text messages will be sent when the Appointment-AppointmentCancelled trigger is activated.

   One email is sent to the caller's email address, one email is sent to the technician's email address, and one email is sent to the creator. One text message is sent to the technician and the other text message is sent to the caller.

Click to view screenshot.



5. Select *Save* and then select *OK*.

Create a New Event Trigger

1. To create a new trigger on the **Home** view, select *New Trigger Event*.
2. Select the + button to the right of **Trigger Type** and then enter the name of the view to add.
3. Complete the remaining fields/tabs as described in **Viewing/Editing event trigger properties**.

Mappable Fields and Labels

The following is a list of mappable fields/labels for Current Values and Previous Values.

- Attachments can be included and stored
- These are not case-sensitive
- Spaces are optional

Current Values

Value	Additional Information
Actual_Hours	
ADRSCODE	Location ID/Number
Appointment	
Appointment_Description	
Appointment_Group_ID	
Appointment_Priority	
Appointment_Status	
Appointment_Type	
Caller_Email_Address	
Caller_Name	
Caller_Phone	
Cancelled_Reason	
Completion_Date	
Cost_Code_Alias	
CREATDDT	Created Date
CRUSRID	Created User ID
CUSTNAME	Customer Name
CUSTNMBR	Customer ID/Number

Value	Additional Information
Description	
DEX_ROW_ID	
Divisions	
EndDateTime	Ending Date/Time
ENDTIME	End Time
Estimate_Hours	
Labor_Override	
Location_ADDRESS1	
Location_CITY	
Location_Contact_Person_1	
Location_Phone_1	
Location_STATE	
Location_ZIP	
LOCATNNM	Location Name
MDFUSRID	Modified User ID
MODIFDT	Modified Date
Modified_Time	
Priority_of_Call	
Problem_Description	

Value	Additional Information
Purchase_Order	
R_Email	Reply To/Caller Email Address - R_Email comes from the K2A_ResourceExtension table and is the primary email address setup in Schedule.
Service_Call_ID	
Service_Desc_Note	Service Call Description Note
Service_Description	
Service_User_Defined _10	
Service_User_Defined _11	
Service_User_Defined _12	
Service_User_Defined _18	
Service_User_Defined _19	
Service_User_Defined _2	
Service_User_Defined _20	
Service_User_Defined _21	
Service_User_Defined _3	
Service_User_Defined _4	
Service_User_Defined _5	
Service_User_Defined _6	
Service_User_Defined _7	

Value	Additional Information
Service_User_Defined _8	
Service_User_Defined _9	
Service_User_Defined_1	
Skill_Level	
StartDate	Start Date
StartDateTime	Start Date/Time
State_Created	
State_Scheduled	
STRTTIME	Start Time
SV_Tool_ID	
Task_Date	
Technician	
Technician_Long_Name	
Technician_Status	
TechnicianEmail	TechnicianEmail comes from the SV00115.SV_Pager_PIN column which can be used for the technician's SMS email gateway email address. e.g. {phone-number}@vtext.com[1] for Verizon as an example.
TechnicianPhone	
TechnicianSkillLevel	

1 http://vtext.com

Value	Additional Information
Time_Entered_CB	Time Entered checkbox
Type_of_Call	Call Type
Type_of_Problem	Problem Type
UDCB1	AC Notify flag
UDCB2	
UPRTRXCD	Payroll Transaction Code
UserDD1	
UserDD2	
USERDEF1	
USERDEF2	
USRDAT01	
USRDAT02	
Wennsoft_Affiliate	
Wennsoft_Branch	
Wennsoft_Region	
WS_Cost_Code	Cost Code
WS_Job_Number	Job Number

Previous Values

Value	Additional Information
prev_Actual_Hours	
prev_ADRSCODE	Previous Location ID/Number
prev_Appointment	
prev_Appointment_Description	
prev_Appointment_Group_ID	
prev_Appointment_Priority	
prev_Appointment_Status	
prev_Appointment_Type	
prev_Caller_Email_Address	
prev_Caller_Name	
prev_Caller_Phone	
prev_Cancelled_Reason	
prev_Completion_Date	
prev_Cost_Code_Alias	
prev_ prev_CREATDDT	Previous Created Date
prev_CRUSRID	Previous Created User ID
prev_CUSTNAME	Previous Customer Name
prev_CUSTNMBR	Previous Customer ID/Number

Value	Additional Information
prev_Description	
prev_DEX_ROW_ID	
prev_Divisions	
prev_EndDateTime	Previous Ending Date/Time
prev_ENDTIME	Previous End Time
Estimate_Hours	
prev_Labor_Override	
prev_Location_ADDRESS1	
prev_Location_CITY	
prev_Location_Contact_Person_1	
prev_Location_Phone_1	
prev_Location_STATE	
prev_Location_ZIP	
prev_LOCATNNM	Previous Location Name
prev_MDFUSRID	Previous Modified User ID
prev_MODIFDT	Previous Modified Date
prev_Modified_Time	
prev_Priority_of_Call	
prev_Problem_Description	

Value	Additional Information
prev_Purchase_Order	
prev_R_Email	Previous Reply To/Caller Email Address - R_Email comes from the K2A_ResourceExtension table and is the primary email address setup in Schedule.
prev_Service_Call_ID	
prev_Service_Desc_Note	Previous Service Call Description Note
prev_Service_Description	
prev_Service_User_Defined _10	
prev_Service_User_Defined _11	
prev_Service_User_Defined _12	
prev_Service_User_Defined _18	
prev_Service_User_Defined _19	
prev_Service_User_Defined _2	
prev_Service_User_Defined _20	
prev_Service_User_Defined _21	
prev_Service_User_Defined _3	
prev_Service_User_Defined _4	
prev_Service_User_Defined _5	
prev_Service_User_Defined _6	
prev_Service_User_Defined _7	

Value	Additional Information
prev_Service_User_Defined _8	
prev_Service_User_Defined _9	
prev_Service_User_Defined_1	
prev_Skill_Level	
prev_StartDateTime	Previous Start Date/Time
prev_State_Created	
prev_State_Scheduled	
prev_STRTTIME	Previous Start Time
prev_SV_Tool_ID	
prev_Task_Date	
prev_Technician	
prev_Technician_Long_Name	
prev_Technician_Status	
prev_TechnicianEmail	TechnicianEmail comes from the SV00115.SV_Pager_PIN column which can be used for the technician's SMS email gateway email address. e.g. {phone-number}@vtext.com[2] for Verizon as an example.
prev_TechnicianPhone	
prev_TechnicianSkillLevel	
prev_Time_Entered_CB	Previous Time Entered checkbox

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Value	Additional Information
prev_Type_of_Call	Previous Call Type
prev_Type_of_Problem	Previous Problem Type
prev_UDCB1	Previous AC Notify flag
prev_UDCB2	
prev_UPRTRXCD	Previous Payroll Transaction Code
prev_UserDD1	
prev_UserDD2	
prev_USERDEF1	
prev_USERDEF2	
prev_USRDAT01	
prev_USRDAT02	
prev_Wennsoft_Affiliate	
prev_Wennsoft_Branch	
prev_Wennsoft_Region	
prev_WS_Cost_Code	Previous Cost Code
prev_WS_Job_Number	Previous Job Number

Setting Up Technicians in Schedule

1. In *Schedule*, select the Menu icon and then select *Administration*.
2. Select **Resource Options**.
3. Select the resource in the **Resource** list.
4. Enter the following information to integrate with Signature Agent Configuration:
    - **Technician Name (required)**: The technician name defaults into this field.
    - **Position Description**: The resource position defaults into this field.

- **Phone**: Enter the resource's telephone number.
- **Email address**: Enter the company email address(es) that the resource uses. For multiple email addresses, separate with a comma. You can also set up an email-to-SMS text message following the criteria listed in the table below.
- **Notifications**: Mark if the resource should receive notifications at the email address(es) provided.
- **Inactive**: Mark if the resource is currently inactive.
- **Select resource image**: This image will display in the email that is sent to customers if you are using Advanced Communications (page 34).

5. Select *Save*.

Email to SMS

Use the information below to set up an email-to-SMS text message by entering the technician's cell number and the corresponding carrier email.

Carrier	Email to SMS
AT&T	number@txt.att.net[3]
T-Mobile	number@tmomail.net[4]
US Cellular	number@email.uscc.net[5]
Verizon	number@vtext.com[6]
Virgin Mobile	number@vmobl.com[7]

Modifying the Event Trigger Action Properties

1. Launch Signature Agent Configuration.
2. Select the **Home** tab.
3. Navigate to the company's **Event Triggers**.
4. Modify the **Event Trigger Action Properties** for the email action adding the new location properties (Location_ADDRESS1, Location_CITY, Location_STATE, Location_ZIP).
5. Double-click on the Appointment-{appointment-event-name} event trigger.
6. Select the **Actions** tab.
7. Select the **Email** action and then select *Edit*.
8. Right-click in the **Subject** and/or **Email Body** fields to select the new location properties to add.
9. Select *Save*.

3 mailto:number@txt.att.net
4 mailto:number@tmomail.net
5 mailto:number@email.uscc.net
6 mailto:number@vtext.com
7 mailto:number@vmobl.com

Enabling Additional Triggers in Microsoft SQL Server Management Studio

Enabling a Trigger in Microsoft SQL Server Management Studio

By enabling triggers that track changes are turned on or off for these tables. Most of these tables have a delete trigger with a name in the format of 'XXXX_D_CDC' where XXXX is the table name and an insert/update trigger in the form of 'XXXX_IU_CDC'. Two tables make an exception to this rule and have 3 triggers, one for Insert, one for update and one for delete. They are tables SV00300 and SV00301.

To enable a trigger in Microsoft SQL Server Management Studio:

1. Launch **Microsoft SQL Server Management Studio**.
2. Expand *Databases* > *your company database* > *Tables*.
3. Expand the appropriate table.
4. Expand *Triggers*.
5. Right-click on the **XXXX_D_CDC** trigger and select *Enable*. (This is the "delete" trigger.)
6. Right-click on the **XXXX_IU_CDC** trigger and select *Enable*. (This is the "insert/update" trigger.)

Enabled Triggers Script

This script provides a list of all enabled scripts for a given company:

```
SELECT sysobjects.name AS trigger_name, OBJECT_NAME(parent_obj) AS table_name,
             OBJECTPROPERTY(id, 'ExecIsTriggerDisabled') AS [disabled]
FROM sysobjects
WHERE sysobjects.type = 'TR' AND sysobjects.name LIKE '%_CDC'
       and OBJECTPROPERTY(id, 'ExecIsTriggerDisabled') = 0
ORDER BY disabled,sysobjects.name ASC
```

Enabled Triggers Query Results

These are the results of the enabled triggers script query, assuming all nine triggers are enabled. Note that the Entity name does not display in the query results.

Entity	Table Name	Trigger Name	Disabled
Job	JC00102	JC00102_D_CDC	0
		JC00102_IU_CDC	0
Job Cost Code	JC00701	JC00701_D_CDC	0
		JC00701_IU_CDC	0
GP Customer	RM00101	RM00101_D_CDC	0
		RM00101_IU_CDC	0
Technician	SV00115	SV00115_D_CDC	0
		SV00115_IU_CDC	0
Service Option	sv00196	sv00196_D_CDC	0
		sv00196_IU_CDC	0
Location	SV00200	SV00200_D_CDC	0
		SV00200_IU_CDC	0
Service Call	SV00300	SV00300_D_CDC	0
		SV00300_I_CDC	0
		SV00300_U_CDC	0
Appointment	SV00301	SV00301_D_CDC	0
		SV00301_I_CDC	0
		SV00301_U_CDC	0
Equipment	SV00400	SV00400_D_CDC	0

Entity	Table Name	Trigger Name	Disabled
		SV00400_IU_CDC	0

Disabled Triggers Script

If you need to enable triggers for a table not found in this list, run the following script to find the triggers for a given table not in the list and then go through Microsoft SQL Server Management Studio and manually enable the trigger:

```
SELECT sysobjects.name AS trigger_name, OBJECT_NAME(parent_obj) AS table_name,
             OBJECTPROPERTY(id, 'ExecIsTriggerDisabled') AS [disabled]
FROM sysobjects
WHERE sysobjects.type = 'TR' AND (sysobjects.name LIKE '%_D_CDC' or
sysobjects.name LIKE '%_IU_CDC')
       and OBJECTPROPERTY(id, 'ExecIsTriggerDisabled') = 1
ORDER BY disabled,sysobjects.name ASC
```

Disabled Triggers Query Results

GP Database Level

These are the query results at the GP database level from the disabled triggers script. Note that the Entity name does not display in the query results.

Entity	Table Name	Trigger Name	Disabled
Call Source	SVCALSRC	SVCALLSRC_D_CDC	1
		SVCALLSRC_IU_CDC	1
GP Company	SY01500	SY01500_D_CDC	1
		SY01500_IU_CDC	1

Company Database Level

Entity	Table Name	Trigger Name	Disabled
GP GL Account	GL00100	GL00100_D_CDC	1
		GL00100_IU_CDC	1
Job User Defined	JC00107	JC00107_D_CDC	1
		JC00107_IU_CDC	1
Estimate Revision	JC00201	JC00201_D_CDC	1
		JC00201_IU_CDC	1
Forecast Revision	JC00401	JC00401_D_CDC	1
		JC00401_IU_CDC	1
Job Cost Note	JC00501	JC00501_D_CDC	1
		JC00501_IU_CDC	1
Job Bill Code	JC00601	JC00601_D_CDC	1
		JC00601_IU_CDC	1
Job Revenue Code	JC00610	JC00610_D_CDC	1
		JC00610_IU_CDC	1
Employee Union Code Master	JC00801	JC00801_D_CDC	1
		JC00801_IU_CDC	1
Change Order	JC01001	JC01001_D_CDC	1
		JC01001_IU_CDC	1

Entity	Table Name	Trigger Name	Disabled
Change Order Cost Code	JC01002	JC01002_D_CDC	1
		JC01002_IU_CDC	1
Job Change Order Revenue Code	JC01004	JC01004_D_CDC	1
		JC01004_IU_CDC	1
Job Vendor	JC01501	JC01501_D_CDC	1
		JC01501_IU_CDC	1
Job Vendor Date	JC01504	JC01504_D_CDC	1
		JC01504_IU_CDC	1
Job Project	JC01701	JC01701_D_CDC	1
		JC01701_IU_CDC	1
Rate Class	JC01801	JC01801_D_CDC	1
		JC01801_IU_CDC	1
Job Lien Waiver	JC20705	JC20705_D_CDC	1
		JC20705_IU_CDC	1
Fed Class	JC40106	JC40106_D_CDC	1
		JC40106_IU_CDC	1
Union Code	JC40201	JC40201_D_CDC	1
		JC40201_IU_CDC	1
Cost Element	JC40209	JC40209_IU_CDC	1

Entity	Table Name	Trigger Name	Disabled
Resource Extension	K2A_ResourceExtension	K2A_ResourceExtension_D_CDC	1
		K2A_ResourceExtension_IU_CDC	1
GP Purchase Order	POP10100	POP10100_D_CDC	1
		POP10100_IU_CDC	1
GP Purchase Order Detail	POP10110	POP10110_D_CDC	1
		POP10110_IU_CDC	1
GP Address	RM00102	RM00102_D_CDC	1
		RM00102_IU_CDC	1
GP Salesperson	RM00301	RM00301_D_CDC	1
		RM00301_IU_CDC	1
Installation By	SV_00415	SV_00415_D_CDC	1
		SV_00415_IU_CDC	1
Time Zone	SV00045	SV00045_D_CDC	1
		SV00045_IU_CDC	1
Division	SV00077	SV00077_D_CDC	1
		SV00077_IU_CDC	1
Note	SV000805	SV000805_D_CDC	1
		SV000805_IU_CDC	1
Customer	SV00100	SV00100_D_CDC	1

Entity	Table Name	Trigger Name	Disabled
		SV00100_IU_CDC	1
Technician Vehicle	SV00113	SV00113_D_CDC	1
		SV00113_IU_CDC	1
Technician Branch	SV00114	SV00114_D_CDC	1
		SV00114_IU_CDC	1
Technician Skill Set	SV00155	SV00155_D_CDC	1
		SV00155_IU_CDC	1
Sublocation	SV00201	SV00201_D_CDC	1
		SV00201_IU_CDC	1
Problem Type	SV00310	SV00310_D_CDC	1
		SV00310_IU_CDC	1
Call Type	SV00320	SV00320_D_CDC	1
		SV00320_IU_CDC	1
Appointment Status	SV00325	SV00325_D_CDC	1
		SV00325_IU_CDC	1
Technician Activity	sv00326	sv00326_D_CDC	1
		sv00326_IU_CDC	1
User Define 1	SV00330	SV00330_D_CDC	1
		SV00330_IU_CDC	1

Entity	Table Name	Trigger Name	Disabled
User Define 2	SV00331	SV00331_D_CDC	1
		SV00331_IU_CDC	1
Contract Equipment	SV00403	SV00403_D_CDC	1
		SV00403_IU_CDC	1
Equipment Type	SV00405	SV00405_D_CDC	1
		SV00405_IU_CDC	1
Manufacturer	SV00410	SV00410_D_CDC	1
		SV00410_IU_CDC	1
Model Number	SV00411	SV00411_D_CDC	1
		SV00411_IU_CDC	1
Extended Warranty Type	SV00420	SV00420_D_CDC	1
		SV00420_IU_CDC	1
Meter Reading	SV00430	sv00430_D_CDC	1
		sv00430_IU_CDC	1
Contract	SV00500	SV00500_D_CDC	1
		SV00500_IU_CDC	1
Task Code	SV00560	SV00560_D_CDC	1
		SV00560_IU_CDC	1
Skill Level	SV00572	SV00572_D_CDC	1

Entity	Table Name	Trigger Name	Disabled
		SV00572_IU_CDC	1
Invoice History	SV00701	SV00701_D_CDC	1
		SV00701_IU_CDC	1
Service Cost Code	SV00735	SV00735_IU_CDC	1
Building	SV01200	SV01200_D_CDC	1
		SV01200_IU_CDC	1
Refrigerant Type	SV40180	SV40180_D_CDC	1
		SV40180_IU_CDC	1
Refrigerant Code	SV40182	SV40182_D_CDC	1
		SV40182_IU_CDC	1
Refrigerant Leak	SV40184	SV40184_D_CDC	1
		SV40184_IU_CDC	1
GP Internet Address	SY01200	SY01200_D_CDC	1
		SY01200_IU_CDC	1
GP Employee	UPR00100	UPR00100_D_CDC	1
		UPR00100_IU_CDC	1
GP Employee Tax Info	UPR00300	UPR00300_D_CDC	1
		UPR00300_IU_CDC	1
GP Employee Pay Code	UPR00400	UPR00400_D_CDC	1

Entity	Table Name	Trigger Name	Disabled
		UPR00400_IU_CDC	1
GP Employee State Tax	UPR00700	UPR00700_D_CDC	1
		UPR00700_IU_CDC	1
GP Department	UPR40300	UPR40300_D_CDC	1
		UPR40300_IU_CDC	1
GP Position	UPR40301	UPR40301_D_CDC	1
		UPR40301_IU_CDC	1
GP Pay Code	UPR40600	UPR40600_D_CDC	1
		UPR40600_IU_CDC	1
GP Workers Comp	UPR40700	UPR40700_D_CDC	1
		UPR40700_IU_CDC	1
GP Payroll State	UPR41100	UPR41100_D_CDC	1
		UPR41100_IU_CDC	1
Purchase Order Detail	WS10101	WS10101_D_CDC	1
		WS10101_IU_CDC	1
TimeTrack Option	WS40000	WS40000_D_CDC	1
		WS40000_IU_CDC	1
TimeTrack Registered User	WS41001	WS41001_D_CDC	1
		WS41001_IU_CDC	1

Entity	Table Name	Trigger Name	Disabled
Attachment	WSDOCS	WSDOCS_D_CDC	1
		WSDOCS_IU_CDC	1

Restoring Default Triggers

You can restore a company's default standard triggers from the Home view.

> **WARNING**
>
> This removes ALL the company's trigger configurations and any new triggers you may have created. This includes all standard and advanced communication triggers.

To restore the default standard triggers:

1. Launch Signature Agent Configuration.
2. Select the **Home** tab.
3. Expand Tenant and select the company name.
4. From the top navigation, select *Restore Default Triggers*.
5. You may receive up to two confirmation windows, one for standard triggers and one for advanced communications triggers. In each confirmation window, select *OK.*

Working With Advanced Communications

Advanced Communications is an add-on product that provides you with the ability to send the following appointment trigger emails to your customers from within Schedule. You can send the advanced HTML email notification in Schedule from the appointment window by selecting **Notify Customer** or by right-clicking the appointment and then choosing *Notify Customer*.

> If the Advanced Comm Triggers tab is not displayed, contact WennSoft Support.

In addition to the default standard triggers (page 0), Advanced Communications provides you the ability to notify the customer and/or technician when the following appointment triggers occur:

Trigger	AC_Notify	Default Notification
Appointment Canceled	1	Notify Button
Appointment Changed	1	Notify Button
Appointment Completed	0	Automatic

Trigger	AC_Notify	Default Notification
Appointment Scheduled	1	Notify Button
Request Received	0	Automatic
Technician Arrived	0	Automatic
Technician In Route	0	Automatic

Advanced Communications is set up within two applications:

- **Signature Agent Configuration** contains the company information including the logos and accent color for the HTML email. For setup information, see Completing Signature Agent Configuration (page 4).
- **Schedule** contains the technician information including the technician's position, email address, and photo that is included in the HTML email. For more information, see Setting Up Technicians in Schedule (page 22).

Viewing and Editing Advanced Comm Triggers

> Because the templates for Advanced Communications are prepopulated and cannot be edited, the Actions tab is not enabled in the Edit Event window. To see samples of the email templates, see Sample Advanced Communication Email Notifications (page 37).

Viewing a Trigger's Properties

To view the properties for a trigger, select the trigger and the operations and trigger criteria display at the bottom of the window.

Enabling a Trigger

1. To edit the trigger properties, select an event trigger and then select **Properties**.
2. In the Edit Event window, the *General* tab displays the General Settings and Operations. For Advanced Communication triggers, these fields are display-only and cannot be edited, except for the Trigger Enabled checkbox.
    - **Trigger Name**: Indicates that any time a service call is created, this event will be active.
    - **Trigger Type**: Displays a list of active CDC tables.
    - **Event ID**: Displays the name of the Event ID.

- **Operations:** Indicates that any time something deleted, inserted, and/or updated in the CDC table view, the trigger will activate. Depending on the trigger type, additional choices are available in the Operations section.
- The **Trigger Enabled** checkbox indicates that the trigger is in use.

3. Select *OK*.

Editing Trigger Criteria

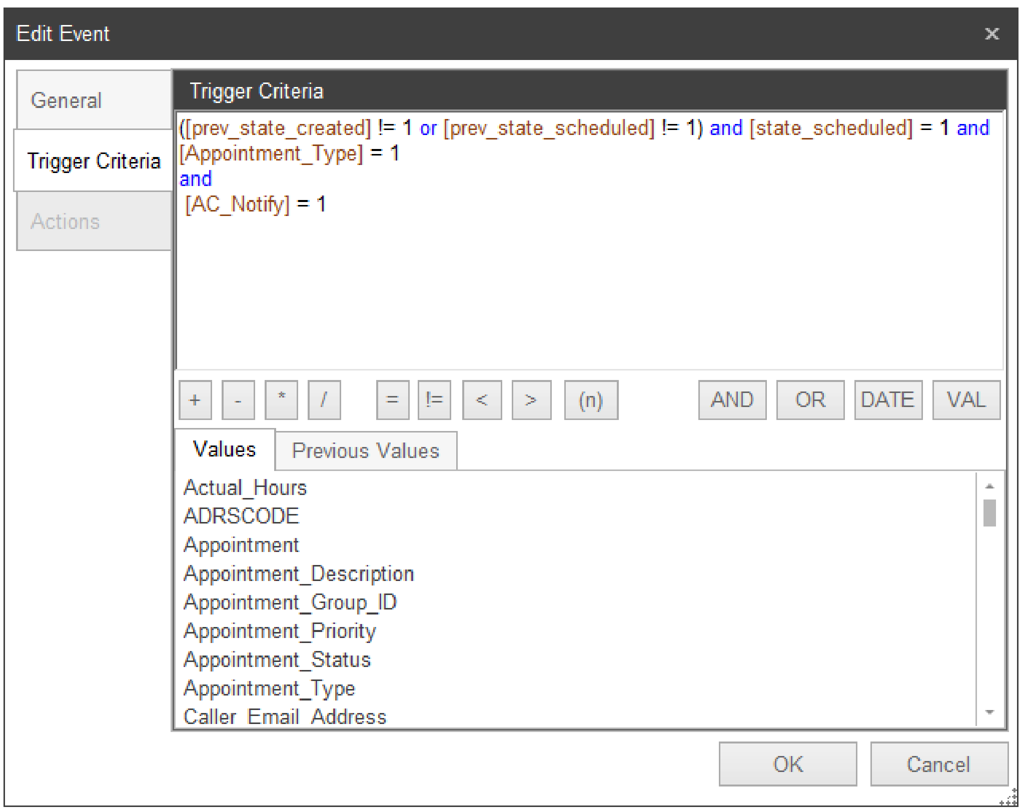
The Trigger Criteria tab is used to set up specific criteria that may need to be met for the trigger to activate.

> When using a DATE field, the parameters must be encompassed between hash marks #.
> For example: [CREATDDT] > **#**2022-01-26 00:00:00**#**.

To edit the trigger properties:

1. Select an event trigger and then select **Properties**.
2. Select the **Trigger Criteria** tab.
3. Use the Values and Previous Values tabs and the formula buttons to create the trigger criteria. To enter the values necessary for the formulas, select the VAL button and enter the data.
4. If you want to have your triggers automatically send notifications to your customers and technicians, you can edit the **AC_Notify** criteria value to 0. When the AC_Notify criteria is set to 1, the Notify button in Schedule needs to be selected to send the notification.

   Click to view screenshot.



5. Select *OK*.

Sample Advanced Communication Email Notifications

The following are examples of the Advanced Communication email templates:

- Appointment Cancelled
- Appointment Changed
- Appointment Complete
- Appointment Scheduled
- Request Received
- Technician In Route
- Technician Arrived

Click to view screenshots.

Appointment Cancelled

The request for service at **ACCURATE-12500 CLEVELAND AVE** has been cancelled.

If this request has been cancelled in error, please contact Fabrikam, Inc. at **(312) 436-2671** to reschedule this request.

APPOINTMENT INFO

SERVICE CALL NUMBER
210422-0003:0001

CUSTOMER
ACCURATE PRINTING

LOCATION
ACCURATE-12500 CLEVELAND AVE

REQUESTOR
Dan Balsbaugh

REQUEST
NOTIFY TEST

4277 West Oak Parkway | Chicago, IL 60601-4277 | (312) 436-2671 |

Appointment Changed

FABRIKAM

Andrew Seltzer

Master Technician

Your appointment at **ACCURATE-12500 CLEVELAND AVE** has been changed and is scheduled for **Thursday, April 22, 2021** at **4:00 PM**. Your appointment information and technician contact information can be found below.

To reschedule or cancel your appointment, please contact Fabrikam, Inc. at **(312) 436-2671** .

APPOINTMENT INFO

SERVICE CALL NUMBER

210422-0003:0001

CUSTOMER

ACCURATE PRINTING

LOCATION

ACCURATE-12500 CLEVELAND AVE

REQUESTOR

TECHNICIAN INFO

NAME

Andrew Seltzer

CELL

2622993344

EMAIL

dbalsbaugh@key2act.com

Appointment Complete

FABRIKAM

Andrew Seltzer

Master Technician

The work associated with your request at **ACCURATE-12500 CLEVELAND AVE** is now complete.

For additional information about your appointment, please contact Fabrikam, Inc. at **(312) 436-2671** .

SERVICE CALL NUMBER
210422-0002:0001

CUSTOMER
ACCURATE PRINTING

LOCATION
ACCURATE-12500 CLEVELAND AVE

REQUESTOR
Dan Balsbaugh

REQUEST
ADVCOMM TEST 2

NAME
Andrew Seltzer

CELL
2622993344

EMAIL
dbalsbaugh@key2act.com

Appointment Scheduled

FABRIKAM

Andrew Seltzer

Master Technician

An appointment has been scheduled at **ACCURATE-12500 CLEVELAND AVE** for **Thursday, April 22, 2021** at **4:00 PM**. Your appointment information and technician contact information can be found below.

To reschedule or cancel your appointment, please contact Fabrikam, Inc. at **(312) 436-2671** .

APPOINTMENT INFO

SERVICE CALL NUMBER
210422-0004:0002

CUSTOMER
ACCURATE PRINTING

LOCATION
ACCURATE-12500 CLEVELAND AVE

REQUESTOR

TECHNICIAN INFO

NAME
Andrew Seltzer

CELL
2622993344

EMAIL
dbalsbaugh@key2act.com

Request Received

A request for service has been received for **ACCURATE-12500 CLEVELAND AVE**.

If this request has been made in error or is no longer required, please contact Fabrikam, Inc. at **(312) 436-2671** to cancel this request.

APPOINTMENT INFO

SERVICE CALL NUMBER
000101-0003:0001

CUSTOMER
ACCURATE PRINTING

LOCATION
ACCURATE-12500 CLEVELAND AVE

REQUESTOR
dbalsbaugh@KEY2ACT.COM

REQUEST
This is my service request test service call

4277 West Oak Parkway | Chicago, IL 60601-4277 | (312) 436-2671 |

Technician In Route

FABRIKAM

Andrew Seltzer

Master Technician

The technician handling this appointment has been dispatched to **ACCURATE-12500 CLEVELAND AVE** and is scheduled to arrive at **3:00 PM**. Your appointment information and technician contact information can be found below.

For additional information about your appointment, please contact Fabrikam, Inc. at **(312) 436-2671** .

APPOINTMENT INFO

SERVICE CALL NUMBER
210422-0003:0001

CUSTOMER
ACCURATE PRINTING

LOCATION
ACCURATE-12500 CLEVELAND AVE

REQUESTOR
Dan Balsbaugh

TECHNICIAN INFO

NAME
Andrew Seltzer

CELL
2622993344

EMAIL
dbalsbaugh@key2act.com

Technician Arrived

FABRIKAM

Andrew Seltzer

Master Technician

The technician handling your appointment has arrived at **ACCURATE-12500 CLEVELAND AVE** and is about to begin working on your request.

For additional information about your appointment, please contact Fabrikam, Inc. at **(312) 436-2671** .

APPOINTMENT INFO

SERVICE CALL NUMBER
210422-0003:0001

CUSTOMER
ACCURATE PRINTING

LOCATION
ACCURATE-12500 CLEVELAND AVE

REQUESTOR
Dan Balsbaugh

TECHNICIAN INFO

NAME
Andrew Seltzer

CELL
2622993344

EMAIL
dbalsbaugh@key2act.com

Sending Email Requests To Create a Service Call

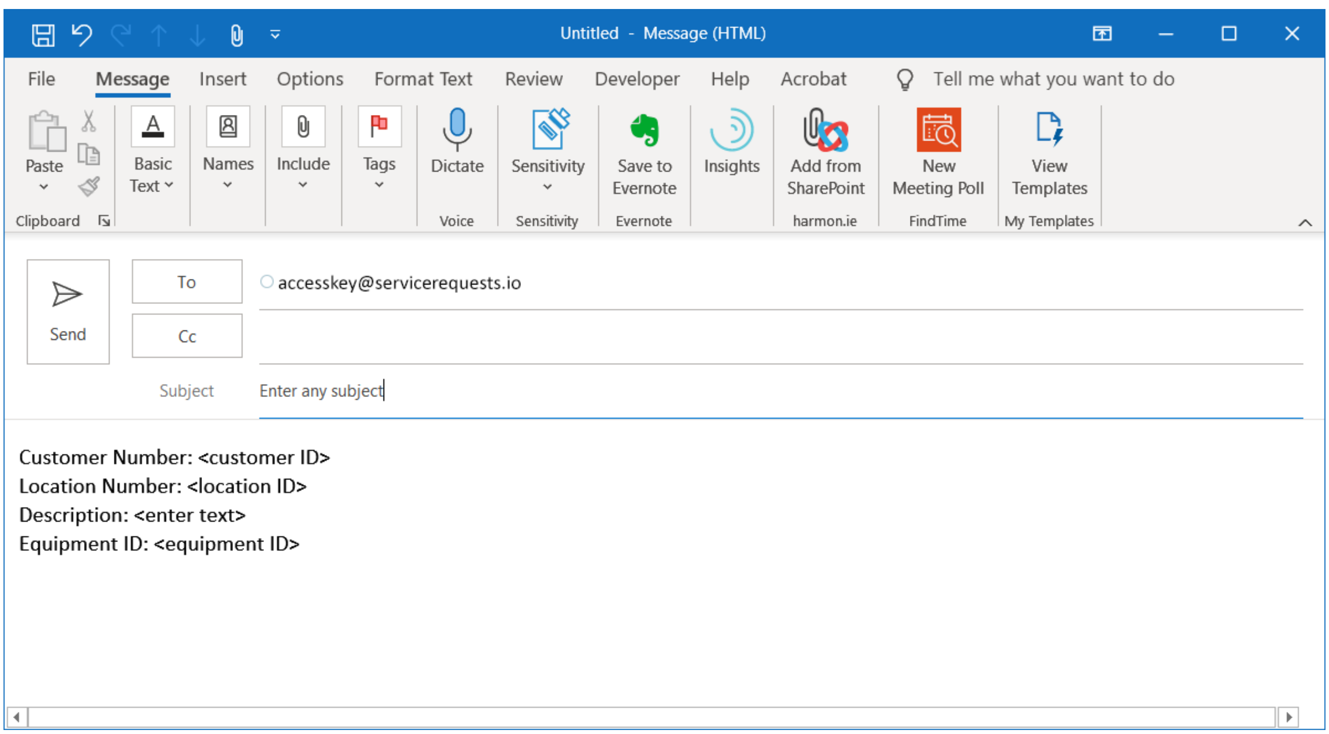
Your customer can send an email that is sent to the *accesskey@s*[8]*ervicerequests.io* email address OR to an email address that our user has set up (service@company.com) that forwards the email to the access key email address.

In Outlook the body text can be added to a **Quick Part** template gallery to quickly insert the information into a new email. The customer would then only have to enter a subject line and the description after inserting the Quick Part. See Working with Quick Part Templates (page 52) below.

1. Your customer opens their email program and opens a new message.
2. The customer enters the:
   - Email Address
   - Email Subject
   - Email body that follows the template as determined by the user in the Event Trigger Properties.
3. The following lines including the colon ":" in the body of the email are **required** to generate a service email. Additional fields may be added, like "Equipment ID:".
   - Customer Number: <Actual customer number in Signature>
   - Location Number: <Actual location ID in Signature>
   - Description: <Used in service call description>

Example Email

Example of an email with the optional line for Equipment ID:



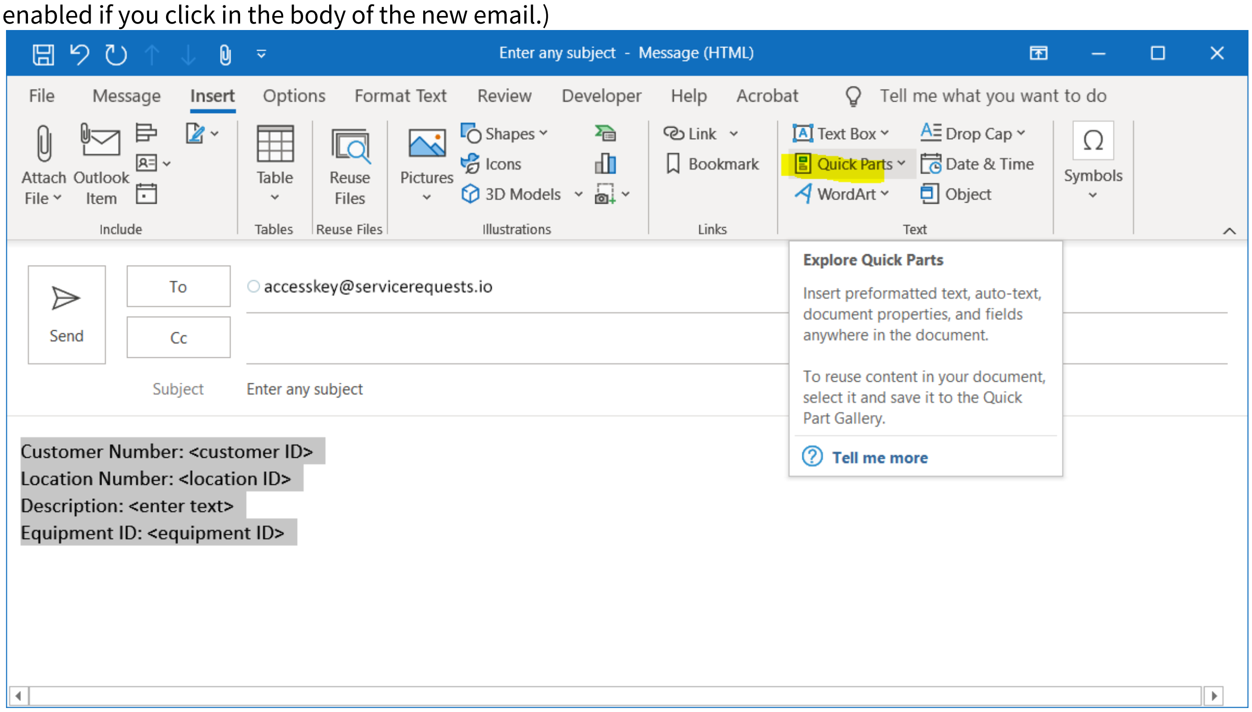
8 http://servicerequests.io

Working With Microsoft Outlook Quick Part Templates

Adding a Quick Part Template in Microsoft Outlook

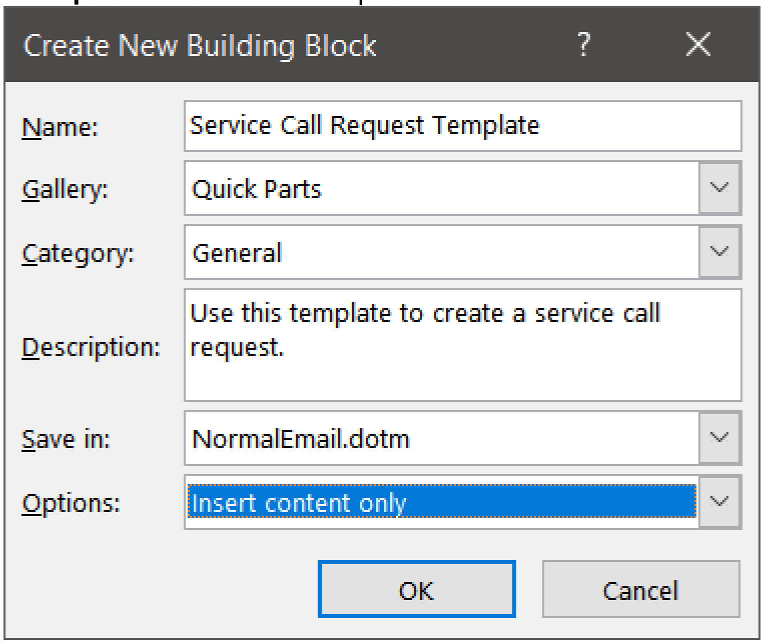
If you are using Microsoft Outlook email, you can have your customers create a Quick Part.

1. Open a new message window (as if to send a new email).
2. Type and then select the text to be added as a Quick Part.
3. On the **Insert** tab, locate the **Text** section. (The Insert tab is only visible in a new email. The Text section is only enabled if you click in the body of the new email.)



4. Select *Quick Parts*.
5. Select *Save Selection to Quick Part Gallery…*
6. In the Create New Building Block window, you can name the Quick Part and enter a description.
   - **Name:** Enter a descriptive name.

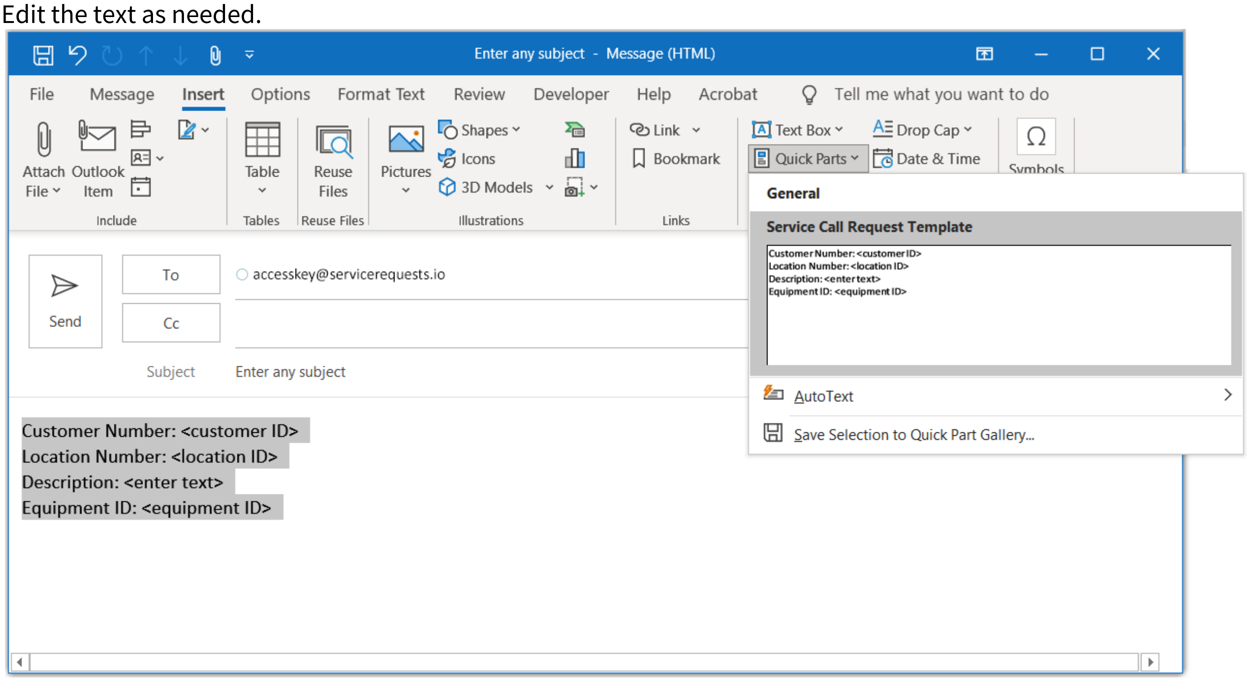
- **Description:** Enter a brief description.



7. Select OK.

Using a Quick Part Template

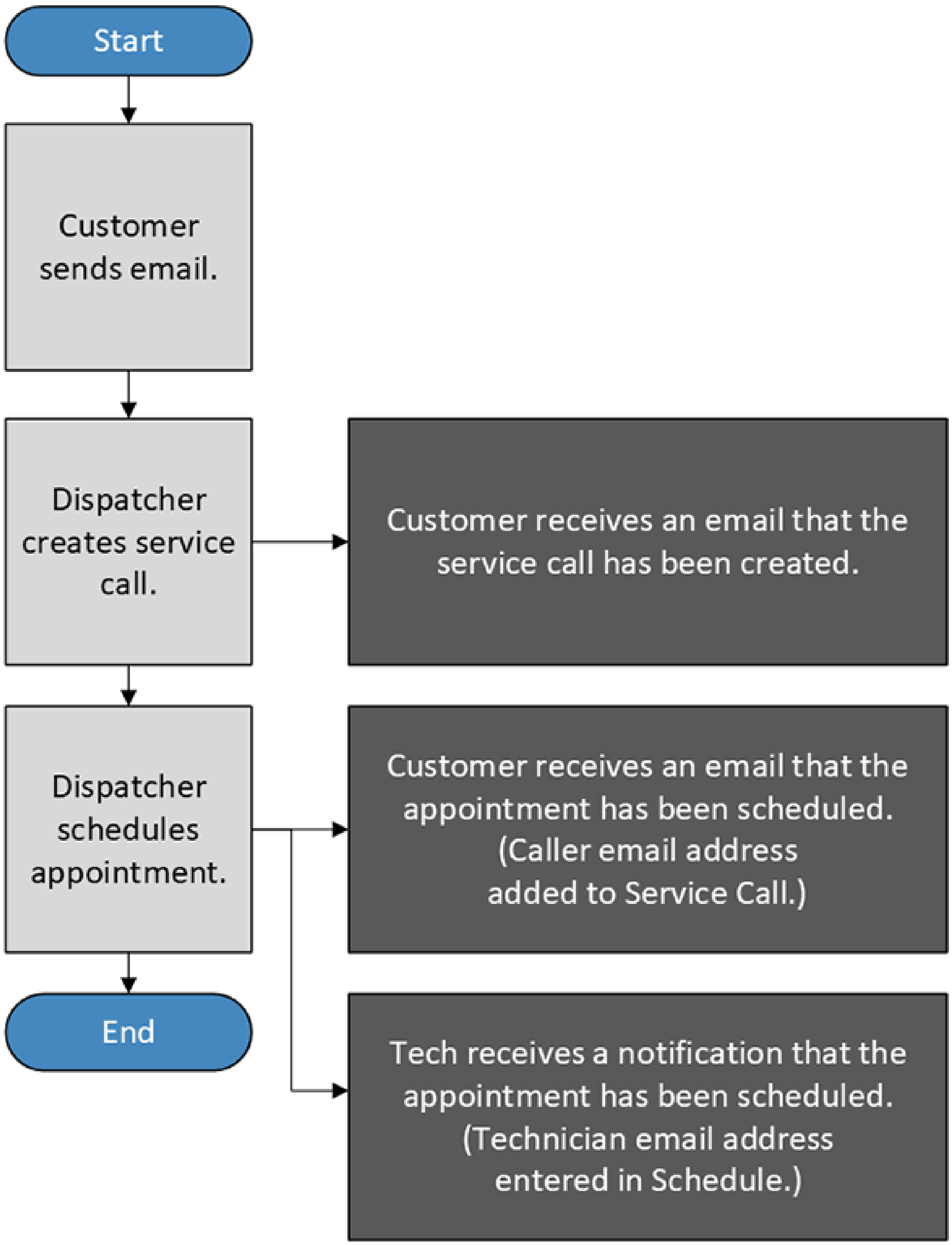
1. Open a new message window (as if to send a new email).
2. On the **Insert** tab, locate the **Text** section.
3. Select *Quick Parts*.
4. Select the appropriate template.
5. The body of the email is populated with the text.
6. Edit the text as needed.



Flow Examples

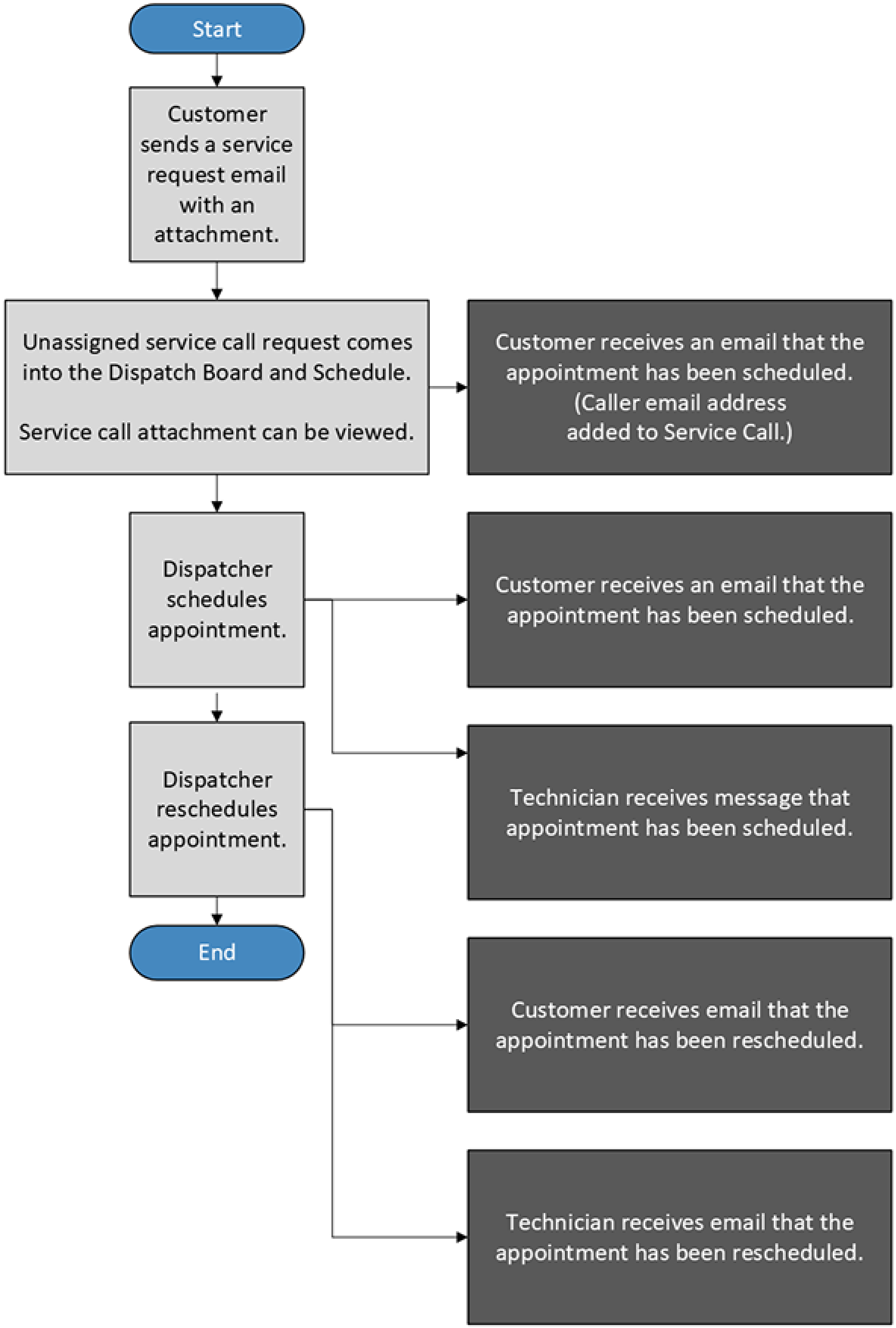
Simple Email

Depending on the recipient configuration in the Event Trigger Properties, the following may occur:

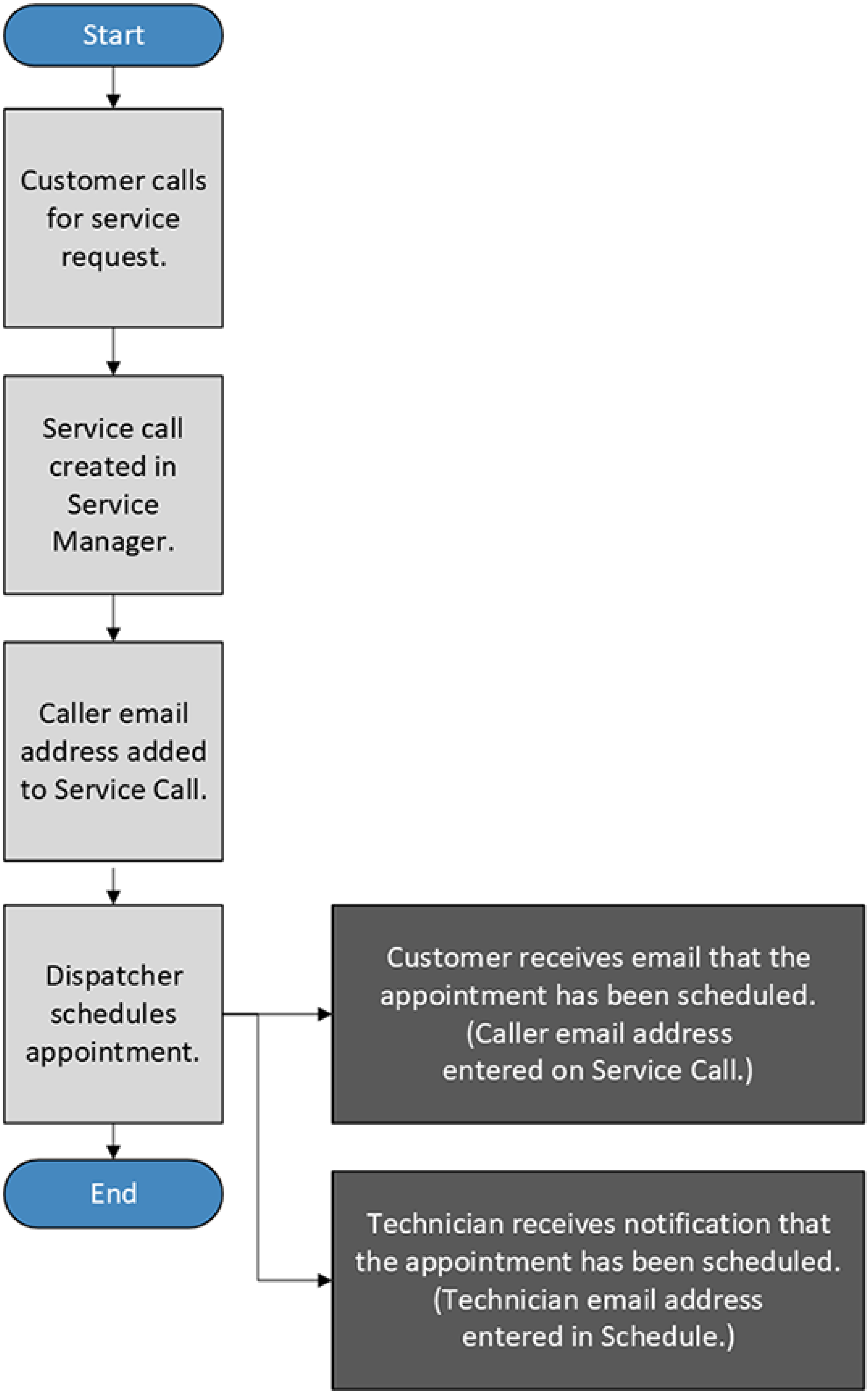


Email With Attachment

In addition to the email, the customer may attach a file to the email message. For example, a picture of the malfunctioning equipment.


Start
Customer sends a service request email with an attachment.
Unassigned service call request comes into the Dispatch Board and Schedule.
Service call attachment can be viewed.
Customer receives an email that the appointment has been scheduled. (Caller email address added to Service Call.)
Dispatcher schedules appointment.
Customer receives an email that the appointment has been scheduled.
Technician receives message that appointment has been scheduled.
Dispatcher reschedules appointment.
Customer receives email that the appointment has been rescheduled.
Technician receives email that the appointment has been rescheduled.
End

Customer Calls for Service and Wants Notifications


Start
Customer calls for service request.
Service call created in Service Manager.
Caller email address added to Service Call.
Dispatcher schedules appointment.
End
Customer receives email that the appointment has been scheduled. (Caller email address entered on Service Call.)
Technician receives notification that the appointment has been scheduled. (Technician email address entered in Schedule.)

Accessing the Signature Status Page

The Signature Status page includes the following Signature Agent Application Service status information.

- A graph displays the uptime status for the past 90 days. The uptime percentage is displayed beneath the graph.
- A calendar view of the uptime by selecting View historical uptime.
- Previous incidents are listed by date below the status graph section.

Access the Signature Status Page

1. In Signature Agent, select *About*.
2. Select **Signature Status** to open a browser to https://signature.statuspage.io/.
3. Select the *Subscribe to Updates* button to receive notifications whenever the Status Page has new, updated, or resolved incidents. After you subscribed, you'll receive a notification that asks you to confirm your subscription. You can receive updates in one or more of the following methods: email, text message, webhook, and/or RSS feed. You can also access the WennSoft Customer Support Center.

Uninstalling Signature Agent Configuration

Uninstall the Agent Service

Prior to uninstalling Signature Agent, you will need to uninstall the Agent Service.

1. Launch Signature Agent Configuration.
2. From the button bar, select *Uninstall Service*.
3. Select *OK* in the Success pop-up window.

Uninstall Signature Agent Configuration

To permanently remove Signature Agent Configuration, you will need to uninstall Signature Agent from the Microsoft Add/Remove Programs window.

Contact Information

Support

Phone: 262-317-3800
Email: support@wennsoft.com[9]
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 additional information.

WennSoft will be closed in observance of the following holidays: New Year's Day, Memorial Day, Juneteenth, Independence Day, Labor Day, Veteran's 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[10].

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11 mailto:info@wennsoft.com
12 http://www.wennsoft.com