WennSoft

Signature

Map2BOB 2021 (1.1) Guide

Legal Declarations

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Map2BOB Overview

Map2BOB provides an efficient process that will allow a Signature Service Management (SMS) user to create entity data in Building Optimization Broker (BOB) using data from ERP Customers, Locations, Equipment, and Contacts. This also creates the link between the BOB entity and the ERP entity. If you've already created entity data in Building Optimization Broker, you can use the Map2BOB features to link existing BOB entity data to its ERP equivalent.

This linking of ERP data to the Building Optimization Broker will enable Service Requests initiated in BOB to be transitioned into a Signature Service Call for any linked Signature Customer, Location, and Equipment, with valid to references Signature Location Contacts. Signature Service Calls created from BOB Service Requests will be additionally linked by the BOB Work Order Number which is stored in the Signature Service Call entity. Additionally, the linking of BOB and ERP entity data allows MobileTech to expose the BOB Dashboard which exposes BOB Fault and Priority data to the field.

Access the Map2BOB mapping window from the Service Manager > Additional window where you can:
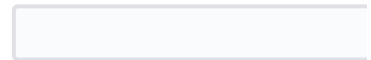
- Link Clients
- Link Contacts
- Link and Track Sites
- Link and Track Equipment

Map2BOB Window Overview

- Sort a column by selecting the column header.
- Drag a column header up to the "Drag a column header" section to group the table by that column.
- Search for an entity using the Search field in the top right corner.
- Filter within a column by entering the criteria at the top of the column in the Filter field.
- Filter the displayed entities using the Edit Filter button on the lower right corner. To clear the filter, select Edit Filter and then click the *Delete* ❌ icon.
- Refresh the table by selecting the Refresh button.
- View the BOB Company name, the BOB User name, and the number of Locations (depending on the displayed tab) in the bottom left corner.
- View the Microsoft Dynamics GP User ID in the bottom right corner.
- Select the Home tab to display the options to map Locations (and Customers, Contacts, or Equipment).

How can I tell if an entity is tracked and/or linked?

Entity	Indicator
Contact	In the Client Contacts window, if the BOB Contact is displayed to the right of the ERP Contact, the two Contact records are linked.

Entity	Indicator
Customer	In the Map2BOB Location tab, if the BOB Client is displayed to the right of the ERP Customer on the Map2BOB Location tab, the Customer and the BOB Client are linked.
Equipment	In the Equipment Tracking window: • If Equipment is tracking in Building Optimization Broker, the Tracked check box is marked. • If the ERP Equipment is linked with BOB Equipment, the Linked column displays the link 🔗 icon to the left of the Equipment.
Location	In the Map2BOB Location tab: • If the BOB Site is tracking in Building Optimization Broker, the Tracked check box is marked. • If a Location is linked with a BOB Site, the Linked column displays the link 🔗 icon.

Prerequisites and Compatibility

Prerequisites

The following software programs must be installed and configured:

• FSM Integrations in Building Optimization Broker (BOB) - You will need the Credentials file that is available to download from the FSM Integrations window.
• Signature 2018 R4 or higher

Compatibility for Map2BOB 1.1.16

• MobileTech 8.5.57 or later
• Schedule 4.6.39 or later

Installing Map2BOB

Installation Notes

• Prior to installing Map2BOB, verify that your instance of Microsoft Dynamics GP is not running.
• If you have previously installed Signature Agent for BOB, you must uninstall this prior to installing Map2BOB 1.2 or higher.

Installing

1. Right-click on the *Map2BOB x-x-x.exe* file and select *Run as administrator*.
2. If the **User Account Control** window displays, select *Yes* to continue with the installation.
3. The **Welcome to the Map2BOB Setup Wizard** displays.
4. Select *Next*.
5. On the **End-User License Agreement** window, accept the license agreement and select *Next.*
6. On the **SQL Server Settings** window, enter your SQL Server System settings:
   - SQL Server
   - Admin SQL User
   - Password
   - GP System Database: The database defaults to DYNAMICS, however, you can change this if you have a different name.
7. Select *Next.*
8. On the **Select Installation Folder** window, you can accept the default installation location or you can select the *Browse* button to select a different location.
9. Select *Next.*
10. On the **Ready to Install** window, select *Install.*
11. Select *Finish*.

Setting up Map2BOB

Security Task Settings in Signature

The K2ABOB_INTEGRATION security task has been added to the Power User and SMS Power User roles. This security task provides access to the Map2BOB window that is accessed from the drop-down menu from the Service Manager window.

Entering Building Optimization Broker Credentials

To set up Map2BOB, you will need to enter the information that is provided by WennSoft. The Serial Number and Authorization Code are provided when you set up the FSM Integration in Building Optimization Broker (in the pop-up window after adding the FSM Integration and also in the credentials.csv file that can be downloaded after setting up the FSM Integration). The Building Optimization Broker Settings window allows Map2BOB to obtain a list of entities from Building Optimization Broker.

> ⚠️ The Building Optimization Broker (BOB) credentials that you enter in Map2BOB will also be shared with MobileTech 8.5 or higher and Schedule 4.6 or higher.

1. In Microsoft Dynamics GP, go to Cards > Service Management > Service Manager.
2. Select Additional > Map2BOB Sites.
3. On the BOB Settings tab, select *Import Credentials*.
4. Select the credentials.csv file that you downloaded when setting up the FSM Integration in Building Optimization Broker.
   - **Signature Agent for BOB Serial Number**: Provided by Building Optimization Broker.

- **Signature Agent for BOB Authorization Code**: Provided by Building Optimization Broker. This is the *authorizationKey* found in the credentials.csv file.
- **User Pool ID**: Defaults from WennSoft.
- **Client ID**: Defaults from WennSoft.
- **Integration URL**: Defaults from WennSoft.

5. Select *Save*.
6. Your BOB company will display to the right of "BOB Company" in the lower-left corner of the window.

Mapping Locations and Sites

Use the Location tab in the Map2BOB window to link/unlink ERP Locations with BOB Sites as well as you can create a new BOB Site from this window. When you open Map2BOB from the Service Manager window's Additional menu, your ERP Customers and Locations display, with each Customer Location on a separate row. This provides you with the ability to select which locations to link and track within BOB. (Cards > Service Management > Service Manager > Additional > Map2BOB Sites)

- If the BOB Client field is empty, you have the option from the ellipsis icon to Manage Client, which provides the ability to create the Client for BOB. See Creating a BOB Client (page 8).
- If the BOB Client is mapped and the BOB Site field is empty, you have the option from the ellipsis icon to
  - Manage Site: Provides the ability to create the Site for BOB. See Creating a BOB Site (page 5).
  - Manage Contacts: Provides the ability to create and link the Contact. See Creating a BOB Site Contact (page 11).
  - Manage Equipment: Provides the ability to create and link the Equipment. See Creating BOB Equipment (page 14)

Additional Information

Map2BOB provides an efficient process that will allow a Signature Service Management (SMS) user to create entity data in Building Optimization Broker (BOB) using data from ERP Customers, Locations, Equipment, and Contacts. This also creates the link between the BOB entity and the ERP entity. If you've already created entity data in Building Optimization Broker, you can use the Map2BOB features to link existing BOB entity data to its ERP equivalent.

This linking of ERP data to the Building Optimization Broker will enable Service Requests initiated in BOB to be transitioned into a Signature Service Call for any linked Signature Customer, Location, and Equipment, with valid to references Signature Location Contacts. Signature Service Calls created from BOB Service Requests will be additionally linked by the BOB Work Order Number which is stored in the Signature Service Call entity. Additionally, the linking of BOB and ERP entity data allows MobileTech to expose the BOB Dashboard which exposes BOB Fault and Priority data to the field.

Columns in this Window

- 👁 **Tracked**: Indicates if the Site data is tracking in BOB.

> ⚠ Only the Sites that have tracking turned on will be used with Service Requests in Building Optimization Broker.

- 🔗 **Linked**: Indicates if the Customer's Location and Site are linked
- **ERP Customer**: Displays the ERP Customer name.

- **BOB Client**: Displays the synced BOB Client name. The field is
- **ERP Location**: Displays the ERP Location name.
- **BOB Site**: Displays the synced BOB Site name.
- **Ellipsis**: The availability of the following options depends on the BOB Client and/or Site availability and/or linked status.
    - Manage Client
    - Manage Contacts
    - Manage Site
    - Manage Equipment

Mapping to an Existing BOB Site

If a Location is not mapped, the Linked column does not display the link 🔗 icon and the BOB Site field is empty. Before you can map to an existing BOB Site, you will need to have that Site's Client records mapped. See Mapping Customers and Clients (page 7).

1. Go to Cards > Service Management > Service Manager.
2. From the Service Manager menu bar, go to Additional > Map2BOB Sites.
3. On the Location tab, select the ellipsis ▪▪▪ to the right of the BOB Site field and then select *Manage Site*.
4. In the New Site window, select the **Site** drop-down to display a list of BOB Sites that have not been linked to ERP Locations. Once the BOB Site has been linked, that name no longer displays in this list. If the Site has not been created in BOB yet, select Create Location. See Creating a BOB Site (page 5).
5. The BOB Site information displays in the appropriate fields. (Note that these fields are not editable.)
6. Select *Create*.
7. On the Location tab, the Location row is updated to indicate the Location/Site is tracking, linked, and the BOB Site name displays.

Buttons on this window

- **Reset**: Resets the window to its original information without closing the window.
- **Create**: Creates the link between entities. (If you are also creating a new entity, this saves the entity and creates the link.)
- **Cancel**: Closes the window without making any changes.

Creating a BOB Site

If you do not have a Site created in BOB that corresponds with an ERP Location, you can create the BOB Site record in Map2BOB. Creating the Site will also automatically link with the ERP Location. Tracking is also automatically marked when the new BOB Site is created. Before you can link and track a BOB Site, you will need to have linked the Site's Client record. See Mapping Customers and Clients (page 7).

1. Go to Cards > Service Management > Service Manager.
2. From the Service Manager menu bar, go to Additional > Map2BOB Sites.
3. On the Location tab, select the ellipsis ▪▪▪ to the right of the BOB Site field and then select *Manage Site*.
4. In the New Site window, select the **Site** drop-down and select <*Create a new BOB Site*>.
5. The ERP Location information defaults into some of the fields.
6. Enter or edit the following fields. Required fields indicated with an asterisk.
    - **Site Name***: Enter the unique Site name. This information defaults from the ERP Location.

- **Street Address, City, State, Postal Code, Country***: Enter the physical rooftop address. This information defaults from the ERP Customer.
- **Building Type***: Select the type of building.
- **Unit of Measure**: Select Square Meters or Square Feet and then provide the measurement of the site.
- **Fuel Types***: Select one or more Fuel Types (optional).
- **Energy, Facilities, Sales Contact**: Select the BOB Contact for each of these fields.

7. Select *Create*.
8. On the Location tab, the BOB Site name is displayed. The **Tracked** check box is marked and the **Linked** 🔗 icon displays on the Location row.

Buttons on this window

- **Reset**: Resets the window to its original information without closing the window.
- **Create**: Creates the link between entities. (If you are also creating a new entity, this saves the entity and creates the link.)
- **Cancel**: Closes the window without making any changes.

Tracking a Site

Only the Customer Sites that have tracking turned on will be used with Service Requests in Building Optimization Broker.

1. Go to Cards > Service Management > Service Manager.
2. From the Service Manager menu bar, go to Additional > Map2BOB Sites.
3. On the Location tab, if a linked Location/Site is not set to tracking, mark the **Tracked** check box.

Untracking a Site

To untrack a site, clear the Tracked check box to the left of the appropriate Site. The service request information will no longer be synchronized.

Unlinking a BOB Site

Unlinking a Site will remove the link between the ERP Location and the BOB Site. If you created a new BOB Site, the Site still exists in Building Optimization Broker.

> ⚠ **WARNING**
>
> Unlinking a BOB Site will also unlink ALL linked Equipment for that Site.

1. Go to Cards > Service Management > Service Manager.
2. From the Service Manager menu bar, go to Additional > Map2BOB Sites.
3. On the Location tab, select the ellipsis ⋯ to the right of the BOB Site field.
4. Select *Manage Site*.
5. In the New Site window, select *Unlink*.
6. Select *Yes* to unlink the entity.
7. On the Map2BOB Location tab, the BOB Site is removed, the **Tracked** check box is cleared, and the **Linked** 🔗 icon no longer displays.

Buttons on this window

- **Cancel**: Closes the window without making any changes.
- **Unlink**: Removes the link to the entity. If you are unlinking a Client, this will also unlink all associated Sites, Equipment, and Contacts. If you are unlinking a Site, this will also unlink Equipment.

Mapping Customers and Clients

Use the Location tab in the Map2BOB window to access the New Client window where you can <u>map ERP Customers with existing BOB Clients (page 8)</u>. You can also <u>create a new BOB Client (page 8)</u> from this window. Additionally, you can <u>unlink the ERP Customer and BOB Client (page 9)</u>.

When you open Map2BOB, your ERP Customers and Locations display, with each Customer Location on a separate row.

Additional Information

Map2BOB provides an efficient process that will allow a Signature Service Management (SMS) user to create entity data in Building Optimization Broker (BOB) using data from ERP Customers, Locations, Equipment, and Contacts. This also creates the link between the BOB entity and the ERP entity. If you've already created entity data in Building Optimization Broker, you can use the Map2BOB features to link existing BOB entity data to its ERP equivalent.

This linking of ERP data to the Building Optimization Broker will enable Service Requests initiated in BOB to be transitioned into a Signature Service Call for any linked Signature Customer, Location, and Equipment, with valid to references Signature Location Contacts. Signature Service Calls created from BOB Service Requests will be additionally linked by the BOB Work Order Number which is stored in the Signature Service Call entity. Additionally, the linking of BOB and ERP entity data allows MobileTech to expose the BOB Dashboard which exposes BOB Fault and Priority data to the field.

Columns in this Window

- 👁 **Tracked**: Indicates if the Site data is tracking in BOB.

> ⚠ Only the Sites that have tracking turned on will be used with Service Requests in Building Optimization Broker.

- 🔗 **Linked**: Indicates if the Customer's Location and Site are linked
- **ERP Customer**: Displays the ERP Customer name.
- **BOB Client**: Displays the synced BOB Client name. The field is
- **ERP Location**: Displays the ERP Location name.
- **BOB Site**: Displays the synced BOB Site name.
- **Ellipsis**: The availability of the following options depends on the BOB Client and/or Site availability and/or linked status.
  - Manage Client
  - Manage Contacts
  - Manage Site
  - Manage Equipment

Contents

Mapping to an Existing BOB Client

1. Go to Cards > Service Management > Service Manager.
2. From the Service Manager menu bar, go to Additional > Map2BOB Sites.
3. On the Location tab, mark the **Tracking** check box OR To the right of the ERP Customer/Location, select the ellipsis ••• icon and then select *Manage Client*.
4. In the New Client window, from the **Client Name** drop-down, select the BOB Client.
5. The BOB Client information defaults into the remaining fields. You cannot edit the information.
6. Select *Create*.
7. On the Map2BOB window, the BOB Client displays to the right of the ERP Customer. This indicates that the ERP Customer and BOB Client are now linked.

Buttons on this window

- **Reset**: Resets the window to its original information without closing the window.
- **Create**: Creates the link between entities. (If you are also creating a new entity, this saves the entity and creates the link.)
- **Cancel**: Closes the window without making any changes.

Creating a BOB Client

1. Go to Cards > Service Management > Service Manager.
2. From the Service Manager menu bar, go to Additional > Map2BOB Sites.
3. On the Location tab, mark the **Tracking** check box OR To the right of the ERP Customer/Location, select the ellipsis ••• icon and then select *Manage Client*.
4. In the New Client window, from the **Client Name** drop-down, select *<Create a new BOB Client>*.
5. The ERP Customer information defaults into the following fields, however you can edit this information for the new BOB Client.

   ⚠ Editing the BOB Client information will not update the Signature Customer information.

   - **Client Name**: Defaults from the ERP Customer.
   - **Business Type**: Select the type of business associated with this client.
   - **Street Address**: Defaults from the ERP Customer. This address must be the physical rooftop address.
   - **City**: Defaults from the ERP Customer.
   - **State**: Defaults from the ERP Customer.
   - **Postal Code**: Defaults from the ERP Customer.
   - **Country**: Defaults from the ERP Customer.
6. Select *Create*.
7. The New Site window automatically opens so that you can create the new BOB Site for the BOB Client.
   See Creating a BOB Site (page 5) for more information.

Buttons on this window

- **Reset**: Resets the window to its original information without closing the window.
- **Create**: Creates the link between entities. (If you are also creating a new entity, this saves the entity and creates the link.)
- **Cancel**: Closes the window without making any changes.

Unlinking Customers and Clients

Unlinking a Client will remove the link between the ERP Customer and the BOB Client. If you created a new BOB Client, the Client still exists in Building Optimization Broker.

> ⚠ **WARNING**
>
> Unlinking a Client will also unlink all linked Sites, Equipment, and Contacts associated with the BOB Client.

1. Go to Cards > Service Management > Service Manager.
2. From the Service Manager menu bar, go to Additional > Map2BOB Sites.
3. On the Location tab, select the ellipsis ▪▪▪ to the right of the BOB Client field.
4. Select *Manage Client*.
5. In the New Client window, select *Unlink*.
6. Select *Yes* to unlink the entity.
7. The window closes, and on the Location tab, the link 🔗 icon no longer displays.

Buttons on this window

- **Cancel**: Closes the window without making any changes.
- **Unlink**: Removes the link to the entity. If you are unlinking a Client, this will also unlink all associated Sites, Equipment, and Contacts. If you are unlinking a Site, this will also unlink Equipment.

Mapping Contacts

After you have mapped the clients and sites, you can use the Location tab in the Map2BOB window to link/unlink ERP contacts with BOB site contacts. You can also create a new BOB site contact. You can manage the contact mapping from any of the ERP Customer Locations in the Client Contacts window.

To access the Contact window, select the ellipsis icon to the right of the BOB site, and then select *Manage Contacts* to open the Client Contacts window.

> ⚠ To access the Manage Contacts window, the ERP site and BOB site must be mapped.

In the Client Contacts window, all the ERP company's contacts are displayed. If a BOB site contact displays to the left of the ERP contact, this indicates that the contact records are linked. If an ERP customer has the same contact at multiple locations, the contact will only be displayed once in the contact list. You may see multiple listings of a contact with the same name if there is more than one ERP contact ID.

Additional Client Contacts Window Information

- Sort a column by selecting the column header.
- Drag a column header up to the "Drag a column header" section to group the table by that column.
- Search for an entity using the Search field in the top right corner.
- Filter within a column by entering the criteria at the top of the column in the Filter field.
- Filter the displayed entities using the Edit Filter button on the lower right corner. To clear the filter, select Edit

  Filter and then click the Delete ⊗ icon.
- Refresh the table by selecting the *Refresh* button.

Columns on the Client Contacts window

- 🔗 **Linked**: Indicates if the contact records are linked.
- **ERP Contact**: Displays the ERP contact name.
- **BOB Contact**: Displays the synced BOB contact name.
- **ERP Email**: Displays the email address for the ERP contact.
- **ERP Phone Number**: Displays the telephone number for the ERP contact.
- **Ellipsis**: Select the ellipsis to access the Client Contacts window.

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Mapping to an Existing BOB Site Contact

If you have a site contact in Building Optimization Broker that corresponds with the ERP contact, you can quickly link the two contact records. The linked contacts will display the **Linked** 🔗 icon and the BOB contact displays to the left of the ERP contact.

1. Go to Cards > Service Management > Service Manager.
2. From the Service Manager menu bar, go to Additional > Map2BOB Sites.
3. On the Location tab, select the ellipsis ⋯ to the right of the BOB Contact field.
4. Select *Manage Contacts*.
5. In the Client Contacts window, the customer is listed at the top of the window and the table displays the ERP company's contacts.

   > ⚠ Only unique contacts will display in this list. If a customer has more than one location with the same contact assigned, this contact will be displayed one time. A contact may display more than one time if the contact ID is different.

6. To link an existing BOB site contact, select the ellipsis ⋯ icon to the right of the ERP Phone Number and then select *Manage Contact*.
7. In the Create Contact window, select the **Contact Name** drop-down and then select the BOB site client. Only BOB site clients that haven't been mapped yet display in this list. If the site contact is not in the list, you can create a new BOB site contact. See Creating a BOB Site Contact (page 11).

8. The BOB client information displays in the window. This information cannot be edited.
9. Select *Create*.
10. On the Client Contacts window, the BOB site contact now displays to the right of the ERP Contact to indicate the two records are linked.

Buttons on this window

- **Reset**: Resets the window to its original information without closing the window.
- **Create**: Creates the link between entities. (If you are also creating a new entity, this saves the entity and creates the link.)
- **Cancel**: Closes the window without making any changes.

Creating a BOB Site Contact

1. Go to Cards > Service Management > Service Manager.
2. From the Service Manager menu bar, go to Additional > Map2BOB Sites.
3. On the Location tab, select the ellipsis ⋯ to the right of the BOB Contact field.
4. Select *Manage Contacts*.
5. In the Client Contacts window, all the ERP company's contacts are displayed.
6. To create a new BOB site contact, select the ellipsis ⋯ icon to the right of the ERP Phone Number and then select *Manage Contact*.
7. In the Create Contact window, select the **Contact Name** drop-down and then select *<Create a new BOB Contact>*.
8. The ERP Contact information defaults into some of the BOB site contact fields, if the information pre-existed. Required fields are indicated with an asterisk *.
   - **Contact First Name***: Defaults from the ERP contact.
   - **Contact Last Name***: Defaults from the ERP contact.
   - **Title***: Select the title.
   - **Email***: Enter the email address.
   - **Mobile Phone***: Defaults from the ERP contact and is editable.

   > ⚠ The telephone number entered must be a valid number based on the selected Country. Only the first x digits are validated. For example, if the Country selected is United States of America, only the first 10 digits are validated. If I enter 1234568901111, only 123-456-7890 is validated.

   - **Landline Phone**: Enter a landline phone number.
   - **Address 1***: Defaults from the ERP contact and is editable.
     When you select Create, the entered address is updated to the Google postal address format. (For example, if you've entered "South", this is updated to "S".)
   - **Address 2**: Enter the second address line.
   - **City***: Defaults from the ERP contact and is editable.
   - **State***: Defaults from the ERP contact and is editable.
   - **Postal Code***: Defaults from the ERP contact and is editable.
   - **Country***: Select the country.
9. Select *Create*.
10. On the Client Contacts window, the BOB site contact now displays to the right of the ERP contact to indicate the two records are linked.

Buttons on this window

- **Reset**: Resets the window to its original information without closing the window.
- **Create**: Creates the link between entities. (If you are also creating a new entity, this saves the entity and creates the link.)
- **Cancel**: Closes the window without making any changes.

Unlinking BOB Site Contacts

Unlinking a contact will remove the link between the ERP and BOB site contacts. If you created a new BOB site contact, the site contact remains in Building Optimization Broker.

1. Go to Cards > Service Management > Service Manager.

1. From the Service Manager menu bar, go to Additional > Map2BOB Sites.

2. On the Location tab, select the ellipsis ⚫⚫⚫ to the right of the BOB Site Contact field.
3. Select *Manage Contacts*.
4. In the Client Contacts window, all the ERP company's contacts are displayed. If a BOB site contact displays to the left of the ERP contact, this indicates that the contact records are linked.

5. To unlink the contact records, select the ellipsis ⚫⚫⚫ icon to the right of the ERP phone number and then select *Manage Contact*.
6. In the Contact window, select *Unlink*.
7. Select *Yes* to unlink the entity.
8. On the Client Contacts window, the BOB site contact has been removed, indicating the contact records are no longer linked.

Buttons on this window

- **Cancel**: Closes the window without making any changes.
- **Unlink**: Removes the link to the entity. If you are unlinking a Client, this will also unlink all associated Sites, Equipment, and Contacts. If you are unlinking a Site, this will also unlink Equipment.

Mapping Equipment

After you have mapped the Client and Site, you can use the Equipment Tracking window the Map2BOB window to link/unlink ERP Equipment with BOB Equipment as well as you can create BOB Equipment from this window.

1. To access the Equipment window, select the ellipsis ⚫⚫⚫ icon to the right of the BOB Site, and then select *Manage Equipment*.
2. At the top of the window, the current Customer and Location are displayed.
3. The ERP Equipment for the Customer populates in the scrolling window.

Additional Equipment Tracking Window Information

- Sort a column by selecting the column header.
- Drag a column header up to the "Drag a column header" section to group the table by that column.
- Search for an entity using the Search field in the top right corner.

- Filter within a column by entering the criteria at the top of the column in the Filter field.
- Filter the displayed entities using the Edit Filter button on the lower right corner. To clear the filter, select Edit

  Filter and then click the Delete ❌ icon.
- Refresh the table by selecting the *Refresh* button.

Columns on the Equipment Tracking Window

- 👁 **Tracked**: Indicates if the Equipment data is tracking in BOB.

> ⚠ Only Equipment that has tracking turned on will be used with Service Requests in Building Optimization Broker.

- 🔗 **Linked**: Indicates if the Equipment records are linked
- **ERP Equipment ID**: Displays the ERP Equipment ID.
- **BOB Equipment**: Displays the synced BOB Equipment name.
- **ERP Equipment Type**: Displays the ERP Location name.
- **ERP Manufacturer**: Displays the ERP Manufacturer name.
- **ERP Model Number**: Displays the ERP Model Number.
- **ERP Serial Number**: Displays the ERP Serial Number.
- **Ellipsis**: Select the ellipsis icon to access the Equipment Tracking window to map or create BOB Equipment.

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Mapping Existing BOB Equipment

1. Go to Cards > Service Management > Service Manager.
2. From the Service Manager menu bar, go to Additional > Map2BOB Sites.
3. Select the ellipsis ⋯ icon to the right of the **ERP Customer** and then select *Manage Equipment.*
4. In the Equipment Tracking window, the Equipment information populates. If the BOB Equipment field is empty, this indicates that ERP Equipment is not linked with an equivalent BOB Equipment.
5. To link an existing BOB Equipment, you can either select the Tracked check box or select the ellipsis ⋯ icon to the right of the ERP Serial Number and then select *Manage Equipment*.
6. In the Create New Equipment window, the **BOB Client** and **BOB Site** default into this window.
7. Select the **Name** drop-down and then select the appropriate BOB Equipment.
8. The BOB Equipment information defaults into the fields as display-only.
9. Select *Create*.
10. On the Equipment Tracking window, the BOB Equipment name is displayed. The **Tracked** check box is marked and the **Linked** 🔗 icon displays.

Buttons on this window

- **Reset**: Resets the window to its original information without closing the window.
- **Create**: Creates the link between entities. (If you are also creating a new entity, this saves the entity and creates the link.)
- **Cancel**: Closes the window without making any changes.

Creating BOB Equipment

1. Go to Cards > Service Management > Service Manager.
2. From the Service Manager menu bar, go to Additional > Map2BOB Sites.
3. Select the ellipses ▀▀▀ icon to the right of the **ERP Customer** and then select *Manage Equipment.*
4. In the Equipment Tracking window, the Equipment information populates. If the BOB Equipment field is empty, this indicates that ERP Equipment is not linked with an equivalent BOB Equipment.
5. To create a new BOB Equipment, you can either select the Tracked check box or select the ellipsis ▀▀▀ icon to the right of the ERP Serial Number and then select *Manage Equipment*.
6. In the Create New Equipment window, the **BOB Client** and **BOB Site** default into this window.
7. Select the **Name** drop-down and then select *<Create a new BOB Equipment>*.
8. The ERP Equipment information defaults into some of the fields, however, you can edit this information.
    - **Name**: The Name field defaults with a combination of the ERP Equipment ID and the ERP Equipment Type. If there isn't an ERP Equipment Type, just the ERP Equipment ID defaults.
    - **Equipment Type**: Select the BOB Equipment Type.
    - **Manufacturer**: Select the BOB Manufacturer name.
    - **Model Number**: Defaults the ERP Model Number.
    - **Serial Number**: Defaults the ERP Serial Number.
9. Select *Create*.
10. The BOB Equipment is created. On the Equipment Tracking window, the BOB Equipment name is displayed. The **Tracked** check box is marked and the **Linked** 🔗 icon displays.

Buttons on this window

- **Reset**: Resets the window to its original information without closing the window.
- **Create**: Creates the link between entities. (If you are also creating a new entity, this saves the entity and creates the link.)
- **Cancel**: Closes the window without making any changes.

Unlinking BOB Equipment

Unlinking BOB Equipment will remove the link between the ERP Equipment and the BOB Equipment. If you created a new BOB Equipment, the Equipment still exists in Building Optimization Broker.

1. Go to Cards > Service Management > Service Manager.
2. From the Service Manager menu bar, go to Additional > Map2BOB Sites.
3. Select the ellipsis ▀▀▀ icon to the right of the ERP Customer and then select *Manage Equipment*.
4. In the Equipment Tracking window, to the right of the Equipment to unlink, select the ellipsis ▀▀▀ icon.
5. Select *Manage Equipment*.
6. In the Equipment window, select *Unlink*.

7. Select *Yes* to unlink the entity.
8. In the Equipment Tracking window, the BOB Equipment is cleared. The **Tracked** check box is cleared and the **Linked** ⟳ icon no longer displays.

Buttons on this window

- **Cancel** - Closes the window without making any changes.
- **Unlink** - Removes the link to the entity. If you are unlinking a Client, this will also unlink all associated Sites, Equipment, and Contacts. If you are unlinking a Site, this will also unlink Equipment.

Uninstalling Map2BOB

To permanently remove Map2BOB you will need to uninstall Map2BOB from the Microsoft Add/Remove Programs window.

Release Notes

Last Modified: June 01, 2022

Release 1.1.12

Bug Fix

Case #	Description
SMS-1910	We've updated the Contacts APIs based on K2ACore contact fields.

Release 1.1.11

New Feature

Case #	Description
SMS-1739	Contacts are now mapped and/or created at the BOB site-level.

Bug Fix

Case #	Description
SMS-1747	We've removed the comma after the state when creating the formatted address field that is passed into BOB.

Release 1.1.8

Bug Fix

Case #	Description
SMS-1641	Map2BOB now connects as expected to BOB when attempting to create a location.

Release 1.1.7

New Features

Case #	Description
SMS-1283	Removed the Technician and Status Mapping windows from Map2BOB.
SMS-1404	Updated the Create a BOB Site window to now display Unit of Measure so that users can select to enter Square Feet or Square Meters.

Contact Information

Support

Phone: 262-317-3800
Email: support@wennsoft.com[1]
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[2].

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