Signature 2022 (18.05b07) Readme

Release Version: 18.05b07g717
Release Date: December 2022

Signature Installation

IMPORTANT: You must be on the Microsoft Dynamics GP October 2022 (18.5.1556) release, U.S. Year-End Tax Update 2022 (18.5.1596) release, or 2023 January Hotfix (18.5.1635). before installing 18.05b07.

You can upgrade to 18.05b07 from Signature 2016 R3 Service Pack 2 16.00b3g321 or higher. You can verify version information by checking the About Microsoft Dynamics GP window. If you are not on this version, do not install Signature.

> Registration keys need to be updated after upgrading to 18.05b07.

Signature is compatible with the new Microsoft Dynamics GP multi-tenant implementation feature and can be installed on any Microsoft Dynamics GP system database. However, the following Signature products cannot be installed on multiple system databases on the same server: Customer Portal, TimeTrack Excel Client, and MobileTech.

> The size of the SQL log file is no longer shrunk during the install and upgrade processes. You must have enough available disk space to accommodate SQL log growth of more than at least three times the size of your company database.

> **IMPORTANT:** For data integrity, all service invoice batches need to be posted prior to upgrading.

SSRS reports are deployed to a new Signature folder location, such as Signature Service, Signature Job Cost, etc.

- **If you have any modified reports**, you may need to redo your changes if the core report has been updated with this release. By having both versions available, you will be able to compare your modified reports with the updated reports to determine if you need to modify the report(s) in the Signature location. You can manually remove the WennSoft folders when you are done.
- **If you have custom reports**, you will need to update the path location in the WSRepts table.

> **CAUTION:** Do not set up identical sequential NEXT Numbers for Inventory, Payables, and Payroll transactions in Microsoft Dynamics GP Setup. This will cause issues if you have transactions with the same document number on the same service call. In addition to deleting the specific transaction, the other transactions will also be deleted, causing Service to be out of balance. We recommend that using a prefix for Next Numbers like IV000001. Using unique prefixes will prevent the identical Next Number issue.

New Signature users should refer to the *Signature Installation and Upgrade* guide for installation instructions.

Compatibility

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

Signature 18.05b07g717 is compatible with the following:

- Microsoft Dynamics GP October 2022 (18.5.1556) release, U.S. Year-End Tax Update 2022 (18.5.1596) release, or 2023 January Hotfix (18.5.1635).
- Dexterity 18.00.0028.000
- Alternate Window and Report Manager 18.05b07
- eOne SmartConnect 21.1.0.1028
- eOne SmartList Builder 18.05.0050
- Signature Equipment Management 18.05b07g709
- Signature Product Registration
- eTimeTrack Web Service 2018 R6 (18.04b06g626)
- Job Import 16.1.3
- Excel TimeTrack Client 16.0.1.8
- Signature Integration Manager for SmartConnect 18.05b07

MobileTech

- For additional compatibility information, see the MobileTech 9.0 readme documentation.

Schedule

- For additional compatibility information, see the Schedule 5.0 readme documentation.

Signature Agent

- Signature Agent 2.5

Portals:

- Portal Web Service 16.0.01.05
- Portal Security 16.0.01.08
- Portal SMS Integration 18.2.1
- Customer Portal website application 16.0.1.01

Incompatibility

The following features in Microsoft Dynamics GP are not supported in Signature:

- RM Receivable Voiding process is not compatible with posted Signature invoices (created in Service Management, Job Cost, or Equipment Management).
- Scheduled Payments functionality in Receivables.
- Batch Service Invoicing does not support payment terms.
- Lockbox
- When using the Payables Transaction Entry Distribution window, for Service Management or Job Cost transactions, you cannot use a Distribution Type of CASH, PAY, or UNIT.
- Multi-bin Inventory
- Customer Combiner and Modifier
- Vendor Combiner and Modifier
- Pay Code Start and End Dates
- The Professional Services Tools Library that is included with Microsoft Dynamics GP modifies or combines data within GP. The data is not changed within Signature. Using the Professional Services Tools Library, you could modify, change, or delete things that can never be fixed. There is no UNDO button.
- We do not test our Signature solutions for compatibility with Microsoft Dynamics GP Project, Field Service, or HR Payroll.
- Using Letter Writer Assistant to merge data from Microsoft Dynamics GP to Microsoft Word's Mail Merge
- Copying of purchase orders using Copy PO function
- Purchase order returns with serialized inventory items
- Date Effective Tax Rates
- Allowing summary-level tax edits
- Specifying tax details for automatic tax calculations in Company Setup is not supported.
- Calculating tax rebates
- Calculating taxes in General Ledger
- Merging trade discounts and markdown distributions in Sales
- Merging trade discounts and markdown distributions in Purchasing
- Calculating terms discount before taxes
- Promotional and free items
- Service transactions using accounts set
- Transaction batches with a frequency other than single-use
- Payables recurring batch / entering cash receipts assigned to a job in a recurring batch
- Pay Code Modifier
- Automatic Overtime payroll option
- PO Tolerance - shortages
- Intercompany fixed asset transfers
- Editing Payroll history records
- Purchase order receivings with shipments followed by invoice match when the tax is included with the item price.
- Microsoft added a cost warning that was added in Microsoft Dynamics GP 2010 and 2013 for cost variances. If you invoice a single shipment using more than one invoice and the costs of those invoices differ, you will get a warning that your costs don't match. Posting updates the total quantity of the purchase receipt with this cost and your inventory and general ledger will not balance. You can proceed with the transaction, save it to a batch, or delete it. Only this warning is new, this is not a change to functionality. For more information about this warning, see the Dynamics GP Support and Services Blog.
- Assigning suggested sales item to an item
- Analyzing suggested sales items
- Using document attachments in Payables Management transactions such as payables invoice, payables finance charge, payables miscellaneous charge, and payables credit memo.

- Purchase requisitions
- Payroll Timecard workflow (introduced in Microsoft Dynamics GP 2013 R2)
- The Self-Service role, in the Select GP Home Page window off the Customize Home Page window, is not compatible with accessing TimeTrack's Time Card Entry window.
- Procurement and Time Management content areas in the Customize Home page window.
- Using the Report Assignments window to assign Signature SRS reports to print from specific transaction windows.
- When copying journal entries from Excel and pasting into the General Ledger transaction entry window, the account entries, debits, and credits come through, but you will need to enter the Signature information manually.
- Workflow for SharePoint
- The *Warn if vendor has existing purchase order* option is not compatible with the Contract Agreement window in Job Cost.
- Project Level Invoicing does not support multi-currency or payment terms with discounts.

Additional Products

In general, Signature products may not be compatible with Microsoft Dynamics GP's additional products. The following products do not support Signature transactions:

- Sales Order module - SOP returns from invoice documents in Service Advantage
- PO Generator

Installation Notes

> **IMPORTANT**
>
> **Signature 18.05b07 requires SQL Server 2016 or higher due to new or updated functionality,** as indicated in the Required Servers and Applications (page 4) section in the Signature System Requirements.

- This product is installed using the Signature installation wizard. All users must log out of the system before you begin the installation. To open the installation wizard, download and launch the application file on the server. On the Select to Install or Upgrade window, select to upgrade Signature products. Run the Server and Client installation. Run the Client Only installation on all additional clients after upgrading the server. For complete installation instructions, refer to the *Signature Products Installation, Upgrade, and New Features* guide.
- DO NOT remove WennSoft from the **DYNAMICS.SET** file at any time during the installation.
- For a successful upgrade, do not attempt to process more than 10 company databases at the same time in Signature Utilities.
- SQL Reporting Services (SSRS) are 64-bit compatible.
- Signature SSRS reports do not support SharePoint Integrated – Report Server Mode.
- If your company will be using an SSL with HTTPS, you will need to install the latest Signature Registration app. This is compatible with TLS 1.2 Protocols. For more information, see Enable Signature Registration Keys[1] in the *Signature Installation and Upgrade Guide*.

IMPORTANT:

- **Prior to upgrading Signature:**
  - **Refrigerant Tracking Leak Rate Analysis:**
    - Make note of the Refrigerant Tracking Leak Rate Analysis Method that you are using in the Signature Service Options Setup window. After upgrading, verify in this window that your setup

1 https://wennsoft.atlassian.net/wiki/spaces/1805b07/pages/7504100/Enable+Signature+Registration+Keys

option is still correct. The form procedure GetRefrigerantLeakRateMethod has been updated to reference Record 2 instead of Record 1. SMS-1366
- Refrigerant Tracking leak rate calculation has been updated to use the refrigerant released value entered in the Accidentally Released field. Previously, the calculation used the Refrigerant Added value. See Refrigerant Tracking[2] and Choosing Service Options[3]. SMS-1971

- **After upgrading Signature:**
  - **MobileTech users:** You will need to upgrade to MobileTech 9.0.
  - **Schedule users**: You will need to upgrade to Schedule 5.0.
  - **MobileTech and Refrigerant Tracking users:** After upgrading, for the Refrigeration Equipment Type 6 to be available in MobileTech, you will need to refresh lookups in MobileTech Admin (MobileTech Admin > Tools > Refresh Lookups) and have technicians sync their devices.
  - **Service Quick Connect SmartList users:** After upgrading, you will need to delete and reimport the Service Quick Connect SmartList. We've updated the Quick Customer to use WSReserved_CB9 in the SV00100 table. SMS-1604
    During an upgrade:
    - If MobileTech is not present, all values from UDF3 will move to UDF9
    - If MobileTech is present and WsMobileTechOptions UseFieldInvoicing is False, all values from UDF3 will move to UDF9.
    - If MobileTech is not present and WSMobileTechOptions UseFieldInvoicing is True, no changes will be made.
- **SmartConnect users:**
  - The Signature 2018 R5 release requires SmartConnect nodes to be re-installed, as parameter and node logic is often modified as part of a product update. If you have custom SmartConnect nodes created for you by WennSoft, you'll need to work with your Customer Success Manager to schedule an update of custom nodes, as part of your upgrade process.
  - To provide more precise descriptions for errors returned when using a SmartConnect node, you will need to set up Read Access to the SmartConnect database for the user that was set up to run the integrations. In SQL Server Management Studio, the user needs to be mapped to SmartConnect and to have at least the **db_datareader** Database Role Membership. SMS-477
- **Deprecation Note:**
  - A new Job Close window has been added with Signature 2018 R4. To this end, we will deprecate the original Job Close window. The Signature 1804b06 release was the final version for the legacy Job Close window.
  - Process Service Invoicing has been deprecated across two Signature releases: 2018 R3 and 2018 R4. We will make no changes to the base feature for this reason. Any critical defects identified in this feature will have to be handled as hotfixes, as needed. Our new Service Batch Invoicing process is replacing Process Service Invoicing. The Signature 1804b06 release was the final version for the Process Service Invoicing window.
- **Add-on-the-fly functionality has been conditionally removed from the Transfer to Job process.** Based on customer feedback, add-on-the-fly functionality in the Transfer to Job window is now disabled. While this feature is disabled, SMS users will no longer be able to add Jobs and/or Job Cost Codes via the Transfer to Jobs window. If you require this functionality, it can be re-enabled by adding the following line to the Dex.ini file found in the Data folder of your Microsoft Dynamics installation. *EnableTransferToJobCreateJob=TRUE*
- **After upgrading or installing, update the dex.ini to include REVALJEINDETAIL=TRUE** so that purchase price variance entries are created in detail. 23366
- **Beginning with Signature 2018,** the email paging function has changed to use WennSoft's communication platform.
- **If you are using Job Cost and will be switching to the Revenue Performance Obligations revenue method,** you can't create fixed change orders on cost plus jobs.

2 https://docs.key2act.io/display/1805b07/Refrigerant+Tracking
3 https://docs.key2act.io/display/1805b07/Choosing+Service+Options

- **For SM document attachments to be written to a physical file location,** WRITE permission must be given to the folder(s) where the attachments will be copied to for all users, MobileTech and Service Management, who will be attaching files. In addition, the path to where the attachments are to be stored needs to end with a backslash. 21559, 21564, 22021
- **We strongly advise against the practice of saving invoices with committed costs to batches,** as this may result in posting issues. When an invoice with committed costs is saved in a batch, the invoice distributions are NOT recalculated when the purchase order costs are received.
- **Signature Portal users only** – If any modifications have been made to your portal websites, you must make a copy of your modifications BEFORE upgrading your Signature portal(s). Your modifications can be recreated after the upgrade is complete.
- **If you intend to use Job Appointments and you also use TimeZone views in Service Management, your users must use the Alternate Customer Maintenance window to set up GP Customers and Addresses/ Locations.** Failure to use the Alternate Customer Maintenance window will result in job appointments not being properly displayed in Schedule. JC-96
- **For users who post service invoices with committed costs prior to posting the receiving transactions batch.** When you are ready to post the purchase order batch, you will need to recalculate the transaction distributions to avoid any posting discrepancies. To recalculate the receivings transaction distributions:
    a. Go to *Transactions* > *Purchasing* > *Purchasing Batches*.
    b. Select the **Batch ID** and then select *Transactions*.
    c. In the Receivings Transaction Entry window, select the **Receipt No**.
    d. Select *Distributions*.
    e. In the Purchasing Distributions Entry window, select *Default*.
    f. Select *Yes* to reset to clear the existing entries and restore the default distributions.
    g. Select *OK* and then select *Save*.

Sample Data

Sample data can be installed for Job Cost and Service Management as part of the Fabrikam lesson company. Sample data can only be installed on a new installation of Fabrikam. If you have an existing installation of TWO, Inc. and the Fabrikam lesson company with sample data, we recommend that you upgrade your existing data.

Miscellaneous

- Immediately after installing Signature, exit, and restart Signature Utilities before attempting to import any data.
- When installing or upgrading on Microsoft SQL Server, we recommend that you stop and restart the server when the installation or upgrade is complete.
- Extended pricing is not supported for expense and travel transaction types through time entry in TimeTrack, TimeTrack Excel Client, and MobileTech.

New Features

The following new features have been added to Signature.

Service Management

Case #	Description
JC-46	We've added the capability to add attachments to service and job appointments by selecting the paperclip icon to the right of the Appointment field. The attachment remains at the service appointment level. When selecting the file to attach to the appointment, in the Source Documentation section select *Copy To Database*.
SMS-1044	If you are using Map2BOB and are also using any utility that moves equipment or locations, we've added a message that displays after moving the equipment/location. "Please review your Map2BOB records after moving <equipment name> or <location>. You may need to remap the moved equipment or location."
SMS-1354	Users can now view, edit, delete, and add notes on the Service Manager window for customers, location addresses, contract numbers, equipment, and job number. For information on using the Notes window, see Reminder Notes in Service Management[4].
SMS-1437	On the Maintenance Invoicing window, we've added the ability to filter and invoice by contract type. See Creating Maintenance Contract Invoices[5]. If individual contracts that are under the same master contract have different contract types, only the contracts with the filtered contract type will be invoiced.

4 https://wennsoft.atlassian.net/wiki/spaces/1805b07/pages/7513651/Reminder+Notes+in+Service+Management
5 https://wennsoft.atlassian.net/wiki/spaces/1805b07/pages/7516068/Creating+Maintenance+Contract+Invoices

Case #	Description
SMS-1581	Users can now view and/or print the new Schedule Technician Board report that displays in table format and is available from the Report Server only. Schedule is required to view this report. The table displays the technician's name, day/date, and any relevant appointment information including service appointment ID, job ID, and/or activity, customer ID, and estimated hours. Report options include: • Start Day: This defaults to the current date. • Show Technicians with No Appointments: Defaults to No. Select Yes to show all technicians. • Enable Schedule Colors: Defaults to True. Schedule colors are set up in Schedule > Settings > Colors. • Hide Weekends: Defaults to No. Select Yes only to show weekdays. • Hide Estimated Hours: Defaults to No. Select Yes to hide the estimated hours on the report. • Technician: Defaults to the technicians currently on the schedule board in Schedule. • Technician Team: Defaults to the technician team(s) associated with the technicians. • Skill Level: Defaults to the skill level(s) associated with the technicians. • Hide Unscheduled: Defaults to True. Select False to show unscheduled appointments. This report will need to be deployed from the Service Management section of SSRS Reports. See Signature SSRS Report Setup[6] for information on deploying a report.

6 https://wennsoft.atlassian.net/wiki/spaces/1805b07/pages/7507995/Signature+SSRS+Report+Setup

<table>
<tr><th>Case #</th><th>Description</th></tr>
<tr><td></td><td>
<table>
<tr><th>Technician</th><th>Wednesday, September 7, 2022</th><th>Thursday, September 8, 2022</th><th>Friday, September 9, 2022</th><th>Monday, September 12, 2022</th><th>Tuesday, September 13, 2022</th></tr>
<tr><td>ALAN</td><td>ACTIVITY:
JOB MEETING

DEFAULT
Est. Hours:
0.50

1008

DEFAULT
Est. Hours:
1.00</td><td>ACTIVITY:
JOB MEETING

DEFAULT
Est. Hours:
0.50

1008

DEFAULT
Est. Hours:
1.00

041114-0001
ACCURATE
PRINTING
DEFAULT
Est. Hours:
0.50</td><td>ACTIVITY:
JOB MEETING

DEFAULT
Est. Hours:
0.50

1008

DEFAULT
Est. Hours:
1.00

041114-0001
ACCURATE
PRINTING
DEFAULT
Est. Hours:
0.50</td><td>ACTIVITY:
JOB MEETING

DEFAULT
Est. Hours:
0.50

1008

DEFAULT
Est. Hours:
1.00

041114-0001
ACCURATE
PRINTING
DEFAULT
Est. Hours:
0.50</td><td>ACTIVITY:
JOB MEETING

DEFAULT
Est. Hours:
0.50

1008

DEFAULT
Est. Hours:
1.00

041114-0001
ACCURATE
PRINTING
DEFAULT
Est. Hours:
0.50</td></tr>
<tr><td>ANNE</td><td>170401-0012
CEDAR
FAMILY
COUNSELING
DEFAULT
Est. Hours:
0.50

170401-0008
SHIRLEY
WATSON
DEFAULT
Est. Hours:
0.50</td><td>170401-0012
CEDAR
FAMILY
COUNSELING
DEFAULT
Est. Hours:
0.50

170401-0008
SHIRLEY
WATSON
DEFAULT
Est. Hours:
0.50</td><td>170401-0012
CEDAR
FAMILY
COUNSELING
DEFAULT
Est. Hours:
0.50

170401-0008
SHIRLEY
WATSON
DEFAULT
Est. Hours:
0.50</td><td>170401-0012
CEDAR
FAMILY
COUNSELING
DEFAULT
Est. Hours:
0.50

170401-0008
SHIRLEY
WATSON
DEFAULT
Est. Hours:
0.50</td><td>170401-0012
CEDAR
FAMILY
COUNSELING
DEFAULT
Est. Hours:
0.50

170401-0008
SHIRLEY
WATSON
DEFAULT
Est. Hours:
0.50</td></tr>
</table>
</td></tr>
<tr><td>SMS-1663</td><td>When saving Yes/No, Integer, Numeric, and/or Repair task responses on the service call, the WS Response Date field in the SV00317 table is now populated with the current user date.</td></tr>
<tr><td>SMS-1665</td><td>You now have the option to default Leave Contract Open to always be marked, however, the checkbox is not locked so that users can unmark the checkbox for a specific contract. When you save the Maintenance Options window, you will be asked if you want to roll this option down to open contracts. Select Yes to roll down or select No to mark this for new contracts from now on. If you change this option (unmark the checkbox) and save the Maintenance Options window, the message will display again to roll down the change to all open contracts.</td></tr>
</table>

Case #	Description
SMS-1666	You can now update the division on a service call if unposted costs exist, provided that the purchase order is 100% committed with no receipts. See Editing Accounts for a New Service Call Type or Division[7].
SMS-1667	We have added two new columns, Created Date and Created By (or Created User), to several Maintenance Contract tables to provide the ability to audit when records have been created and the user who created the record. The Created Date uses the system date, the Microsoft Dynamics GP user date. • SV_Contract_Billing_HIST (SV00507) • SV_Contract_Billing_HIST_Archive (SVA0507) • SV_Contract_Billing_MSTR (SV00510) • SV_Main_HIST (SV00501) • SV_Main_HIST_Archive (SVA0501) • SV_Main_Invoice_MSTR (SV00564) • SV_Main_Invoice_MSTR_Archive (SVA00564) • SV_Maint_MSTR (SV00500) • SV_Maint_MSTR_Archive (SVA0500) • SV_Master_Contract_MSTR (SV00650) We've removed two WSReserved fields (CB9 and CB10) from the following maintenance contract tables: • SV_Maint_MSTR (SV00500) • SV_Maint_MSTR_Archive (SVA0500) • SV_Main_HIST (SV00501) • SV_Main_HIST_Archive (SVA0501)

7 https://wennsoft.atlassian.net/wiki/spaces/1805b07/pages/7515071/Editing+Accounts+for+a+New+Service+Call+Type+or+Division

<table>
<tr><th>Case #</th><th>Description</th></tr>
<tr><td>SMS-1668</td><td>
Task Codes and Task Lists can now be marked inactive at the setup level while maintaining historical entity record integrity. Task codes are inactivated at the setup level in the Task Code Setup window (Setup >Service Management > Lookup Setup > Tasks > Task Codes). Task lists are inactivated in the Task List Setup window (Setup > Service Management > Lookup Setup > Tasks> Task Lists).

Inactive task codes and task lists are filtered out from displaying in any lookup.
Inactive task lists cannot be copied.
When a task code is marked inactive and already exists in a task list, the inactive task code is indicated with a red indicator .
When using hierarchy task lists, if a parent task is inactive, child tasks of that parent task are also inactive on the task list only.
Existing contracts, quotes, and calls, that have task codes or task lists will not be affected by a task code or task list being marked inactive.
When renewing a contract (single, master, or mass), you can print a new Inactive Task or Task List report before renewing. If the contract has tasks that include inactive tasks and/or task lists, this report is automatically generated as well so that users can fix the data (reactivate the task code/task list or remove the inactive task codes or lists from the contract).
When creating a new contract using equipment at the location, if the equipment type has a task list associated, and you choose to automatically add task codes based on equipment type, only the active task codes will be added to the contract.
In Equipment Management:

Existing scheduled maintenance that has task codes or task lists will not be affected by a task code or task list being marked inactive.
When creating a service call from the On Rental Entry and/or the Rental Agreement Line Entry windows, only active task codes in the Equipment Model task list are added to the service call. (This task list is assigned to the equipment model in the Equipment Model Maintenance window.)
When processing scheduled maintenance to create a service call, only active task codes assigned in the Scheduled Maintenance Type Setup window are added to the service call.

Reports

The existing Maintenance Task Codes report has been updated to include an Inactive column to indicate inactive task codes. See Maintenance Task Codes Report[8].
A new Task Code Task Lists report displays the task code and the task lists that the task code is associated with. Columns include the task code, task description, task list ID, task list description, inactive, use hierarchy, and protected list. See Task Code Task Lists Report[9].

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

8 https://wennsoft.atlassian.net/wiki/spaces/1805b07/pages/7510969/Maintenance+Task+Codes+Report
9 https://wennsoft.atlassian.net/wiki/spaces/1805b07/pages/7510981/Task+Code+Task+Lists+Report

Case #	Description
	System: 4/14/2022 Fabrikam, Inc. Page: 1 User ID: sa Task Code Task Lists Task Code Task Code Description Task List ID Task List Description Inactive Use Hierarchy Protected List == 102 Check Operation Through On & Off Cycle Yes EQ INSPECT Equipment Inspection No Yes No HVAC A/C HVAC AIR CONDITIONING TASK LIST No No No HVAC COM HVAC COMMERCIAL TASK LIST Yes No No HVAC HEAT HVAC HEATING TASK LIST No No Yes • A new Inactive Task Code or Task List Warnings report that can be manually printed from the Contract Quote, Maintenance Contract, Contract Mass Renewal, and Master Contract windows. The report will automatically generate when an inactive task code and/or task list exists on a contract that is generated from the contract quote and/or a contract is renewed. This report displays the inactive tasks and/or inactive task lists that are associated with the quote or contract. The information included in the report is the customer number, customer name, address code, location name, contract/quote number, equipment ID, equipment type, task list ID, task code, and the task code description. System: 4/18/2022 Fabrikam, Inc. Page: 1 User ID: sa Inactive Task Code or Task List Warnings * On current task code/list setup, the task code or task list is inactive. These codes and lists are included as part of the quote or contract. Customer Number Customer Name Address Code Location Name Contract Number Equipment ID - (Type) Task List ID Task List Description Task Code Task Code Description -- 102 CEDAR FAMILY COUNSELING MAIN OFFICE CEDAR-15500 CLEVELAND AVENUE 0000000016 0000000147 - (100 AMP SERVICE) KIMBERLYS * 1.2 Can electrical work be done with the power off?
SMS-1681, SMS-1697	We've added a new refrigerant equipment type of Refrigeration Equipment Type 6 for mid-size appliances (5 to 50 pounds), which is an EPA tracking requirement that does not require leak rate analysis. • This new type is automatically inserted if there isn't a manually added Type 6. • **Leak Rate Analysis Report**: Refrigeration Equipment Type 6 is not included in the Leak Rate Analysis Report. This report targets only equipment that require leak rate analysis. • **For MobileTech users**: For Refrigeration Equipment Type 6 to be available in MobileTech, after upgrading Signature, you will need to refresh lookups in MobileTech Admin (MobileTech Admin > Tools > Refresh Lookups) and have technicians sync their devices.

Case #	Description
SMS-1719	For an MCC (maintenance contract computer-generated) call, in the Service Call Tasks window, you can now view the comments that were added to a task. If a task comment exists for the task, a Task Comments button is displayed in the navigation ribbon. Select Task Comments to open a read-only Task Comments window. See Assigning Tasks and Task Lists to Records[10]. Task comments, an existing feature, are added to the task in the Maintenance Tasks window by selecting the Notes icon in the scrolling window. See Assigning Tasks and Task Lists to Equipment[11] .
SMS-1720	We've added the ability to transfer service call labor costs or billing to a non-labor job cost code. You can also set up the default mapping to link records to a non-labor cost code. See Transferring Costs and Billing from a Service Call to a Job[12].
SMS-1775, SMS-1928	Users can now view service call history by accessing the Service Call Audit window from the Service Call window. The Service Call Audit window displays the history of the service call you are accessing the Service Call Audit window from and includes all the columns from the SV_00300 table. This feature requires the SQL Server Agent to be running. To use this Service Call Audit feature, you will need to: 1. Install the Signature Audit Add-In xx.x.xx.exe file. See Installing Service Call Auditing[13]. 2. Setup and enable Service Call Audit from the new Additional option in the Service Options setup window. See Choosing Setup Options[14]. 3. Access the Service Call Audit window by accessing the Service Call window and selecting Additional > Service Call Audit. See Viewing the Service Call Audit[15].
SMS-1840	We've added a new SmartList for Service Contacts. The Service Contacts SmartList shows Contact ID, Contact Name, Address 1, Address 2, City, State, Postal Code, Email Address, Phone 1, Phone Type, Primary Phone, Contact Type, Contact Organization, Customer Number, Address Code, Customer Name, and Location Name. The Service Contact.xml is available in the GP folder/ Signature/SmartList Builder Objects. For information on using and importing the new SmartList, see Using SmartList Objects for Signature Products[16].

10 https://wennsoft.atlassian.net/wiki/spaces/1805b07/pages/7511299/Assigning+Tasks+and+Task+Lists+to+Records
11 https://docs.key2act.io/display/1805b07/Assigning+Tasks+and+Task+Lists+to+Equipment
12 https://wennsoft.atlassian.net/wiki/spaces/1805b07/pages/7513980/Transferring+Costs+and+Billing+from+a+Service+Call+to+a+Job
13 https://wennsoft.atlassian.net/wiki/spaces/1805b07/pages/7513112/Installing+Service+Call+Auditing
14 https://wennsoft.atlassian.net/wiki/spaces/1805b07/pages/7508432/Choosing+Setup+Options
15 https://wennsoft.atlassian.net/wiki/spaces/1805b07/pages/7513230/Viewing+the+Service+Call+Audit
16 https://wennsoft.atlassian.net/wiki/spaces/1805b07/pages/7516383/Using+SmartList+Objects+for+Signature+Products

Case #	Description

SMS-1877, SMS-1879, SMS-1880, SMS-1885, SMS-1886, SMS-1901	The Mobile Purchase Order Inquiry window has been updated with the following. For information on how to use the window, see Process MobileTech and Schedule Purchase Orders[17].
	• The Mobile Purchase Order Inquiry menu item is now available if Schedule or MobileTech is registered. (Inquiry > Service Management > Mobile Purchase Order Inquiry) Previously this option was available if only MobileTech was registered.
	• Mobile purchase orders added to job appointments can now be processed in the Mobile Purchase Order Inquiry window.
	• Depending on the eConnect error, we've added quick navigation to the specific Microsoft GP Maintenance window:
	    • If a vendor item number has been added to a purchase order in MobileTech, but the vendor item does not exist in Signature, when you select the eConnect error, the message now displays "This item hasn't been assigned a vendor item number. Do you want to assign a vendor item number?" If you select Yes, the Vendor Maintenance window opens with the vendor item number auto-populated in the window. If you select No, you are returned to the Mobile Purchase Order Inquiry window.
	    • If a site has been assigned to an item in MobileTech but is not assigned in Signature, when you select the eConnect error, the message now displays "This site is not assigned to the selected item. Do you want to assign this site?" If you select Add, the Item Quantities Maintenance window opens with the item number, and the site ID auto-populated.
	• You can now zoom on the following fields while focused on the purchase order row:
	    • eConnect Error: Select the eConnect error in the purchase order row to open a pop-up window to view the error message.
	    • Item Number: Select the Item Maintenance header to open the Item Maintenance window to view the item number information.
	    • Service Call or Job Number: Select the Service Call/Job Number header to open the Service Call or Job Maintenance window to view the information.
	    • Technician: Select the Technician header to open the Technician Lookup window to view the technician information.
	    • Vendor: Select the Vendor header to open the Vendor Maintenance window to view the vendor information.
	• We've added a TRX_Origin column to the WS20003 and WS30003 tables with possible values of Schedule, MobileTech, or Signature to indicate where the purchase order was created.
	• The Mobile Purchase Order report has been updated to include the following columns:
	    • Appointment ID
	    • Job Number (The job number is a shared column with Call ID.)
	    • Cost Code Alias
	    • Product Indicator
	    • TRX Origin

17 https://wennsoft.atlassian.net/wiki/spaces/1805b07/pages/7512609/Process+MobileTech+and+Schedule+Purchase+Orders

<table>
<thead>
<tr><th>Case #</th><th>Description</th></tr>
</thead>
<tbody>
<tr><td></td><td>
<pre>
   System: 5/9/2022   Fabrikam, Inc.   Page: 1
           9:41:02 AM   Mobile Purchase Order   User ID: sa
User Date: 5/9/2022   Service Management Series

Call /Job Number PO Number Technician Line   Trx Date   Quantity Unit Cost
---------------- --------- ---------- ----- ---------   -------- ---------
100 JOB 1   ALAN0026   ALAN   16,384 5/2/2022   2.00 $10.00

   Appointment: 000033   Product Indicator: Job Cost
        U of M: Each   Cost Code: 22-2222-222-2
      Location: WAREHOUSE   TRX Origin: MobileTech
          Item: ACCS-CRD-25BK
   Description: Phone Cord - 25' Black
        Vendor: ALLENSON0001
   Vendor Name: Allenson Properties
Billing Amount: $0.00   Invoiced: No

         Error:

100 JOB 1   ALAN0027   ALAN   16,384 5/2/2022   100.00 $0.00

   Appointment: 000033   Product Indicator: Job Cost
        U of M: Each   Cost Code: 11-1111-111-1
      Location: WAREHOUSE   TRX Origin: MobileTech
          Item: APPLE PIE
   Description: Apple Pie
        Vendor: ALLENSON1111
   Vendor Name: Allen Yes Man
Billing Amount: $0.00   Invoiced: No

         Error: 51,096
</pre>
</td></tr>
<tr><td>SMS-1832</td><td>
We've updated the Mass Contract Renewal window with the following:

After tabbing off the filter fields, the contracts now display automatically in the scrolling window. Previously, you had to select the Preview button to display the filtered results. The Preview button is still available, but you no longer have to select this.
You can now filter by contract type.

If you have a master contract that has contracts with different contract types, none of these contracts will display. For example, you have Master Contract 011 with three contracts, two contracts have a contract type of Residential and the other contract has a contract type of Premier. If you filter by the Residential contract type, none of the Master Contract 011 contracts display. This is to help prevent renewal issues for the master contract.

We've added a Clear button to clear the entered filter criteria.
We've added the customer name to display in the Customer Range section.
Master contracts are now grouped together, although still on separate lines, to make it easier to see the contracts that are on a master contract.
We've added a Contract Type column to the scrolling window.
We've added Contract Type to the Contract Mass Renewal Report.

</td></tr>
<tr><td>SMS-1983</td><td>
In the Create Service Invoices window, you can now add a description to a service call. This window is accessed from the Service Batch Invoicing window when you select the Next button from the Service Batch Invoicing window. In the service call scrolling window, you can right-click on the service call and select Edit Description or you can select the Note icon to the right of the service call ID to open the Description window. After adding the text, select OK. If a service call has
</td></tr>
</tbody>
</table>

Case #	Description
	a description added from this window, the Note icon displays as yellow with lines . See Service Batch Invoicing[18]. • Invoices 3 - 7 include the service call descriptions on the reports. You may need to resize the invoice description field on the report for the entire description to print. • Invoices 1, 2, and 8 do not include the service call descriptions.
SMS-2012	In the Service Batch Invoicing window, we've added the ability to filter by service area when displaying invoices to add to the service batch. See Service Batch Invoicing[19].
SMS-2031	From the Service Manager window, we have added Contact Management which can be accessed by selecting the GoTo button from the navigation ribbon. The Contact Management window display is filtered to the customer and location that were selected in Service Manager customer. You can add new contacts or edit existing contacts for that location. See Creating a Contact[20].
SMS-2069	We've updated the wsiWSCreateUpdatePurchaseOrderIntegration stored procedure for use with the Salespad integration to help support a fully committed purchase order and to populate fields in the SV000810 table.

Job Cost

Case #	Description
JC-08	We've added the ability print job notes and custom SSRS reports to the Job Maintenance, Job Status, and Job History windows. Previously, selecting the Print button would only print the Job Report. Now, select the Print button and then select the report you'd like to print. Job Report and Job Notes are static options. You can add up to four custom SSRS reports to the open job windows (Job Maintenance and Job Status) and up to four custom SSRS reports to the closed job window (Job History). When printing Job Notes from any window, all notes for the job are included in the report. For more information, see Custom SSRS Job Cost Reports[21].
JC-46	We've added the capability to add attachments to service and job appointments by selecting the paperclip icon to the right of the Appointment field. The attachment remains at the job appointment level. When selecting the file to attach to the appointment, in the Source Documentation section select *Copy To Database*.

18 https://wennsoft.atlassian.net/wiki/spaces/1805b07/pages/7509724/Service+Batch+Invoicing
19 https://wennsoft.atlassian.net/wiki/spaces/1805b07/pages/7509724/Service+Batch+Invoicing
20 https://wennsoft.atlassian.net/wiki/spaces/1805b07/pages/7514458/Creating+a+Contact
21 https://wennsoft.atlassian.net/wiki/spaces/1805b07/pages/7514565/Custom+SSRS+Job+Cost+Reports

Case #	Description
JC-147	When setting up a job or a project, if a tax schedule is assigned to the job address, the job address tax schedule now overrides the customer tax schedule in the Job Maintenance or Project Maintenance window. You can use the lookup to select a different tax schedule.See Creating a Job Record[22] or Setting up Projects[23].
JC-325	Users can now create an inventory adjustment with a quantity and no cost that is put to a cost code with a profit type of 8 (flat rate per unit) to produce a line on a transaction level invoice (job or project level).
JC-364	We've updated the .NET Job Close window so that the user is now prompted to print the Closed Jobs report after running the job close process. The Closed Jobs report includes all jobs closed for the posting date and filter criteria, not just the jobs the user most recently closed.

TimeTrack

Case #	Description
TT-107	We've added a new setup option to exclude historical non-salary transactions tied to the Week-Ending Date from being exported. In the TimeTrack Setup Options window, under Third Party, mark Do Not Include Historical Transactions. See Choosing Setup Options[24]. For example: You have transactions that have been committed with a week ending date of 07/10. The export file was created, but there was a problem with the file and some transactions were missed. You create a new batch ID and add transactions (week ending date 07/10). • **With this option MARKED** When you go through the Commit process, the Export Wizard ONLY reviews ONE WS10702 table. These non-salary transactions will be included in the export file. • **With this option NOT MARKED** When you go through the Commit process, the Export Wizard reviews the WS10702 and WS30702 tables. Based on the week-ending date you have entered in the Export Wizard, the system will find all the transactions within WS10702 and WS30702. These transactions will be included in the export file.

22 https://wennsoft.atlassian.net/wiki/spaces/1805b07/pages/7508379/Creating+a+Job+Record
23 https://wennsoft.atlassian.net/wiki/spaces/1805b07/pages/7508390/Setting+up+Projects
24 https://wennsoft.atlassian.net/wiki/spaces/1805b07/pages/7508432/Choosing+Setup+Options

Case #	Description
TT-117	Users now have the option to import a comma-delimited text file. Previously, users could only import a .csv file. See Using the TimeTrack Import Feature[25]. **IMPORTANT** If you create the comma-delimited file with Excel (.csv) and you do not enter the batch ID and week-ending date, Excel does not add commas for those columns, and you will have to add them in manually. In addition, if you have cost codes that precede with a 0 and start the cost code in Excel with an apostrophe, it will save with the preceding zero. If you open the .csv file back up in Excel it strips out the preceding zero, so you will have to be careful about reopening a .csv import file if using Excel.

Issues Fixed

Service Management

December 2022

Case #	Description
SMS-2105	We've fixed an issue with the WSMobile_SOPTransaction store procedure. It was reported that this was interfering when using Field Invoicing in Mobiletech. Additionally, an Unhandled Script Exception error message was displayed when attempting to process inventory transactions in the Mobile Inventory Inquiry window. Users could close the error window and the batch could be created and posted.

November 2022

Case #	Description
SMS-1547	Inventory adjustments and inventory transfers no longer link to a job when the document number is the same. We've added an INV Document Type to the validation process.
SMS-1614	In the Process Master Contracts window, the Leave Contracts Open checkbox is no longer cleared when Redisplay is selected after filtering to only show Caution lines. This issue only occurred if there was also an associated contract with an inactive location that was not displayed due to the applied filter.

25 https://wennsoft.atlassian.net/wiki/spaces/1805b07/pages/7508420/Using+the+TimeTrack+Import+Feature

Case #	Description
SMS-1619	When creating a service call from the Equipment Component window, the Components checkbox is now automatically selected in the Equipment window.
SMS-1645	The Contract icon now displays as expected on the Maintenance Contract window when contracts exist for the location.
SMS-1677	The Signature Purchase Order Entry window has been updated to include the Microsoft Dynamics GP Scroll View Bar that displays above the scrolling window.
SMS-1713	We've fixed an issue where the Equipment Selection window would automatically open when creating a service call that isn't part of a maintenance contract and *Change Call Type to MC when add Equipment Under Contract* is not marked in Service Options. This window will now only open so that you can select the equipment/contract when your setup requires the call to be changed to a maintenance call.
SMS-1727	After selecting a technician on the Appointment window, the Technician Team field is now auto-populated.
SMS-1730	When using the Mobile PO or Mobile Inventory Inquiry windows, the billing amount now matches the amount after processing is complete when using the standard matrix pricing with the default set to Bill To for the pricing matrix.
SMS-1743	The Service Call Description is now limited to 30 characters. Users were reporting that the description was truncated, with the truncated characters replacing the existing note on the service call.
SMS-1785	Manually resizing the Service Management Notes window no longer causes user interface issues.
SMS-1812	When setting up a technician, if the Employee ID or Vendor ID is not provided, regardless of the radio button selected, the Technician Long Name will be set to the Technician ID.
SMS-1818, SMS-1824	When a task list is marked Protected in the Task List Maintenance window, the following buttons are disabled. In order to update the protected list, you will need to unmark the Protected checkbox and then access the appropriate windows to make changes to the task list codes. • In the Task List Task Codes window, the Delete button is now disabled so that task codes can no longer be deleted from the list. • In the Task List Detail window, the task codes on the task list can no longer be inserted, removed, or reordered. The Redisplay button has also been disabled.
SMS-1834, SMS-1835	When the following setup: the Billing Rate is $0.00 or greater and Use Extended Pricing by Cost Code (Non-Labor) is not marked. Negative service travel transactions entered through TimeTrack or the Travel window now show the expected negative billing amount.

Case #	Description
SMS-1836	When reopening a service call and choosing to invoice previous unbilled costs, the travel-related cost records from TimeTrack are now calculated as expected. This issue occurred when Service Management travel charges were set up and Use Extended Pricing was not marked. Additionally, in TimeTrack Setup, the option to Expense Reimbursement through Payroll was marked.
SMS-1872	Cash Received is now displayed as expected on the Project Billing Inquiry window after the Paid Transaction Removal process has been run.
SMS-1876	Equipment Auto Number is now released as expected when the user clears or exits the window without saving the new record. This issue only occurred when using global filtering and using Create Number Sequence Per Branch and Branch are marked from the Setup Options window.
SMS-1904	The Mobile Inventory Process now considers an empty LOCNCODE (site) as a non-inventory item. Previously, this was displaying an eConnect error 287.
SMS-1914	When using the Contract Task Import utility when there is an existing task on the contract, the Last_Schedule_Date is now correct.
SMS-1918	If you are creating a new contract and mark the Leave Open checkbox, the checkbox now remains marked when you tab off the next field.
SMS-1923	The Billing fields (Billing Amount, Billable checkbox, and Taxable checkbox) now display as expected in the Added Costs and Added Labor Costs windows when the service call is MC/MCC and you are using Manual Recognition.
SMS-1939	We've fixed an issue with the Service Call Work Order with Appointments/Tasks SSRS report where a blank page was added to the report when saved as a PDF document.
SMS-1984	When correcting a revenue recognition error and Distribute Amounts by Cost Category is not marked in Maintenance Setup, users will no longer receive an "Illegal address for field Billing Equipment in script Revenue_Costs".
SMS-1998	When running the Service Call Work Order with Tasks, the completion date and status are now updated as expected.
SMS-1999	In the Additional Fields tab for equipment, users can now add an attachment and will not receive the error message "All call stacks are in use".
SMS-2001	When updating the Technician on a service call's first and only appointment without opening the Service Call window, the SV00300 Technician record is now updated as expected.

Case #	Description
SMS-2010	In the Journal Entry Inquiry window, Service Management information on the GL transaction now displays as expected if the year on the window was closed.
SMS-2026	When importing a contract task via SmartConnect for a month prior to the contract start date with a multi-year frequency and using Schedule 187 (April), the task date is now created in the contract as expected for the first occurrence in April after the contract start date.
SMS-2033	Users can now enter non-numeric values in Contact Management.
SMS-2060	We've fixed an issue with an “Incorrect syntax near ‘AND’” error when maintenance invoicing a master contract with a large corporate contract number and large customer ID.
SMS-2066	The wsiWSCreateUpdatePurchaseOrderIntegration stored procedure has been updated to include the parameter @I_vTAXABLE. This is now passed into the Pre, Post, and wsiSMSJobCostsWork.
SMS-2078	Users will no longer receive an "Invalid day '0' in date function" error message when renewing a multi-year contract.

Job Cost

Case #	Description
JC-273	In the Item Transaction Entry window, if you edit the date and then select the blue arrow to open the Job Detail window, users are now prompted to Save, Discard, or Cancel the date. This fixes an issue where the date change was reverted back to the original date when the user returns to the Item Transaction Entry window from the Job Detail window.
JC-329	In the .NET Job Close window, jobs with unposted Purchase Order Returns can no longer be closed.
JC-381	The Signature Credit Apply window security has been added to the Job Cost Power User and TRX_WSJC_PROJ002 security task IDs.
JC-412	SOP transactions with the item type of SERVICES going to a Cost Plus job with the Billing Type as Project Trx Level and a profit type of Flat Rate on the cost code now show a billing amount in the Project Transaction Level Billing window.
JC-428	The attachment indicator is now cleared when the attachment is removed from the job (or any child record of the job).

Case #	Description
JC-440	When adding an attachment to a job (or any child record of the job), the job number is now attached to the record in the WSDOCS table.
JC-441	Manually resizing the Job Notes window no longer causes user interface issues.
JC-448	We've added the BillCustomerNumber field to the JC Jobs (wsiJCJobMaster) SmartConnect node.
JC-451, JC-454	Updated the customer label to Customer Name in the Billing Transaction Inquiry and History Billing Transaction Inquiry windows. The fields have always displayed the customer name, but the label was incorrectly titled with Customer ID. This was just a cosmetic change for both windows with no functionality changes.
JC-467	When voiding a payroll check that was created in a different period, a record is now created in the JC20002 for the void and the Job Status and Job Status by Period now match for posted costs.
JC-468	A job can now be marked inactive if a subcontractor payment is voided prior to processing retention.
JC-470	Job information is now clearing out of the open tables upon closing the window when you run a POC Edit List for a period that is two or more periods greater than the period where you closed a job.
JC-471	When the contract maximum is changed in the Job Maintenance window, the current contract amount is now updated as expected.
JC-476	Reopening a job now creates a journal entry as expected when the batch from the closing of the job is still unposted.
JC-477	We are now excluding the $0 remaining Release Amounts in the listview when selecting Available Contract Cost Codes when selecting cost codes in the Contract Agreement Payables Entry window.
JC-478	You can now post a purchase order invoice with a Purchase Price Variance (PPV) when the job assigned to the purchase order has been closed.

TimeTrack

Case #	Description
SMS-1962	If a payroll batch contains only unbilled labor transactions and either *Payroll Post to Service* or *Payroll Post to Job Cost* is marked in Settings, when the batch is committed, the transactions no longer show up in the UPR 10302 table.

Case #	Description
TT-120	The payables batch now has the batch total for business expenses or travel expenses sent to Accounts Payables (using the setup option to Create Exp/Travel through to AP).
TT-122	The Manager's Comment field that is used when rejecting an employee's time entry transaction is now cleared once the transaction has been approved.
TT-126	When importing a TimeTrack transaction using the TimeTrack import process, all imported transactions now have a WS_Transaction_Status of 1 (for PENDING) in table WS_Time_Sheet_TRX_WORK.
TT-132	When reimbursing through Accounts Payable and using standard pricing, the billing amount is now correct for Travel transactions.
TT-133	We've fixed an issue where users were able to edit a pay rate on a rate class transaction.
TT-136	We've updated the Invoice Travel Setup window so that the Cost Rate field is accurately displaying the cost rate, not a calculated total cost. The issue only occurred when more than one Business Expense pay codes were set up and using Standard Pricing.
TT-156	Users can now enter a UNC path in the File Pathname field in the TimeTrack Export Wizard.
TT-178	The Signature Employee Lookup search field is no longer case-sensitive.
TT-179	When importing a Service Management transaction into TimeTrack while using the setup option "Use Overhead Amounts from Job Cost", if the billing amount in the overhead setup has decimals, the billing amount in WS10702 comes is now imported with decimals.