Signature 2021 (18.04b06) Readme

Release Version: 18.04b06g626
Release Date: November 2021

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Signature Installation

IMPORTANT: You must be on the Microsoft Dynamics GP October 2021 (18.4.1361) release or U.S. Year-End Tax Update 2021 (18.4.1384) release before installing 18.04b06.

You can upgrade to 18.04b06 from Signature 2016 R3 Service Pack 2 16.00b3g321 or higher. 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 18.04b06.

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 18.04b06 g626 is compatible with the following:

- Microsoft Dynamics GP October 2021 (18.4.1361) release or U.S. Year-End Tax Update 2021 (18.4.1384) release
- Dexterity 18.00.0028.000
- Alternate Window and Report Manager 18.04b06
- eOne SmartConnect 21.1.0.471, 20.18.1.49
- eOne SmartList Builder 18.04.0040
- Signature Equipment Management 18.04b06 g605
- Signature Product Registration
- Signature Product Registration 2018
- Signature Agent 2.5.6
- eTimeTrack Web Service 2018 R6 (18.04b06g626)
- Job Import 16.1.3
- Excel TimeTrack Client 16.0.1.8
- SmartConnect Integration Manager 18.04b06

MobileTech

- For additional compatibility information, see the MobileTech 8.6 readme documentation.

Schedule

- For additional compatibility information, see the Schedule 4.7 readme documentation.

Signature Agent

- Signature Agent 2.5.6

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:

- 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.
- Voiding a Microsoft Dynamics GP Receivables Management transaction does not update Job Cost.
- 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

- 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:

- **MobileTech users:** After upgrading to Signature 2018 R6 (18.04b06), you must also upgrade to MobileTech 8.6. We recommend that you upgrade to Signature 2018 R6 prior to upgrading to MobileTech 8.6. If you upgrade to MobileTech 8.6 before upgrading to Signature 2018 R6, you will need to re-run the Create MobileTech Objects in MobileTech Admin.
- **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.

1 https://wennsoft.atlassian.net/wiki/spaces/1804b06/pages/7524500/Enable+Signature+Registration+Keys

  - If MobileTech is not present and WSMobileTechOptions UseFieldInvoicing is True, no changes will be made.
- **Refrigerant Tracking Leak Rate Analysis:** Prior to upgrading, 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 option is still correct. The form procedure GetRefrigerantLeakRateMethod has been updated to reference Record 2 instead of Record 1. SMS-1366
- **SmartConnect users:**
  - This 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 is 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 is 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.
- **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 install 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 in Signature:

Service Management

Case #	Description
SMS-288, SMS-1018	Users can now initiate a new service call from the Equipment Master window and/or the Equipment Component window for an existing equipment record by selecting New Call from the menu bar. The Equipment ID defaults into the Service Call window. (To access the Equipment Master window, go to *Cards* > *Service Management* > *Service Manager* > *Additional* > *Equipment*. Select the equipment and then select *Edit* OR Select *Cards* > *Sales* > *Customer* > *Location* > *Equipment*.) To access the Equipment Component window, select the *Component* button on the Equipment Master window. ⚠ If the user is creating a new equipment record, the record will need to be saved prior to creating a service call.
SMS-505	The Customer Class field has been added to the Add Service Customer (Customer Quick Add) window accessed from the Service Manager window. (Cards > Service Manager > Additional > Quick Add Customer)
SMS-628	A new Master Contract Service History window can be accessed from the Master Contract window by selecting the new Service History button. This window displays the service call history for all contracts on the master contract. At the top of the window, the Customer ID and Master Contract ID display. The columns display the Service Call ID, Problem Type, Call Status, Completed Date, Contract Number, and Address Code. The window defaults to display Open service calls and you have the option to display Completed and/or Closed service calls. The sorting order on this window is by contract number, contract sequence, and then service call ID. You can open the service call window to view the call by selecting the service call row and then clicking *Select*. Security access for this window has been added to ADMIN_WSSMS_ROUTINE_001 and CARD_WSSMS_CONT_001. See Viewing Master Contract Service Call History[2].
SMS-750	The Reconcile process for Cost, Billing, and/or Revenue now prints a report for each process that displays the BEFORE and AFTER totals, as well as any changed items, are indicated with an asterisk. The reports will print automatically and only if any changes were made. For examples of the reports, see Maintenance Contract Reconciliation Reports[3] in the Reports guide.

2 https://wennsoft.atlassian.net/wiki/spaces/1804b06/pages/7530124/Viewing+Master+Contract+Service+Call+History
3 https://wennsoft.atlassian.net/wiki/spaces/1804b06/pages/7524438/Maintenance+Contract+Reconciliation+Reports

Case #	Description
SMS-758	If a user attempts to add a piece of equipment that is not covered by the contract to a Maintenance Contract (MC) service call, a message similar to the following display: "Equipment ID xxxx is not covered by Contract xxxx. Do you still wish to use the equipment?" or if more than one equipment: "There are x pieces of equipment on the service call not covered by Contract xxxx. Do you still wish to use the equipment?" Users have the option to select Yes to continue with the equipment added to the call OR to select No to return to the window with the added equipment cleared. This validation has been added to the following windows: • Service Call • Service Call Task Codes • Copy Task List • Service Call Tasks • Add Task List
SMS-834	In Service Management Setup Options, use the Call Roll Forward Start Time field to enter the start time for appointments that are rolled forward. If you do not enter a start time, 12:00 AM is the default start time for rolled forward appointments.
SMS-845	When copying equipment from the Equipment Master window, a message now displays "Are you sure you want to copy this equipment?" to indicate that the copy process will occur. Previously, it was reported that users were clicking the Copy button more than once as nothing displayed to show that the equipment was copied, which then created more than one duplicate piece of equipment.
SMS-961	We've added a new alternate GP report called Inventory Adjustments Edit List that includes the job and cost code or service call and cost category information. View the dexterity report by going to Inventory Adjustments Edit List[4] in the Reports guide. For information on adding access to the alternate window, see the Alternate Windows and Reports Manager Guide[5]. For information on creating inventory adjustment transactions in Signature, see Entering Inventory transactions as adjustments[6], or for Job Cost, see Entering Inventory Transactions in Job Cost[7].
SMS-1094	The World icon has been added to the right of the Address ID field in the Location window. Selecting the icon opens the Internet Information window where you can enter internet-related information that you want to track for the Address ID.
SMS-1153	We've updated the Estimate Labor Hours (1-5) and Forecast Labor Hours (1-5) fields' data types from LI6_S2 to LI8_S2, which allows for 6 digits plus 2 decimal places to allow for a keyable amount up to 999,999.99. The total fields were resized to display the maximum values.

4 https://wennsoft.atlassian.net/wiki/spaces/1804b06/pages/7526105/Inventory+Adjustments+Edit+List
5 https://wennsoft.atlassian.net/wiki/spaces/1804b06/pages/7530811/Alternate+Windows+and+Reports+Manager
6 https://wennsoft.atlassian.net/wiki/spaces/1804b06/pages/7530989/Entering+Inventory+Transactions+in+Service+Management#EnteringInventoryTransactionsinServiceManagement-inventorytrxadjustments
7 https://wennsoft.atlassian.net/wiki/spaces/1804b06/pages/7528992/Entering+Inventory+Transactions+in+Job+Cost

Case #	Description
SMS-1170	A technician's latitude and longitude coordinates are now being obtained from Resco audit records when the appointment status is changed. This information is stored in the SV00301, SVA0301, and SV30301 tables and may be used for reporting purposes.
SMS-1200	When correcting a journal entry, users now have the option to terminate the entire process by selecting the Cancel button in the message that displays the closed service call ID that will be reopened.
SMS-1229	Users can use the PO line status of 6 with wsiWSCreateUpdatePurchaseOrderIntegration to cancel existing purchase order lines.
SMS-1238	Call Type (Type_Call_Short) has been added to the service call deletion history table (SV00340). You can add this to a SmartList to track deleted service calls by call type. For example, to see all deleted service calls with a call type of MCC. Additionally, the Call Type has been added to the Service Call Log window and the Service Call Log by ID and Service Call Log by Date reports that are printed from this window. (Reports > Service Management > Service > Service Call Log)
SMS-1242	The Signature Registration app will now function on a Secure Sockets Layer (SSL) and allows the use of HTTPS. This is compatible with TLS 1.2 Protocols. For more information, see Enable Signature Registration Keys[8] in the Signature Installation and Upgrade Guide.
SMS-1408, SMS-1434	The Maintenance Invoicing window has a new *Include Non-Auto Billed Contracts in Preview* option that provides the ability to include non-auto billed contracts on the SV_PM_Invoice_Preview report. This checkbox defaults to marked.
SMS-1425	The Time Zone Data Utility has been updated to allow any member of DYNGRP to execute the branch, location, and technician time zone values as well as the service data. The appointment view can only be updated by the "sa" user. See Update Time Zone Data[9].
SMS-1430	We've added the Technician column to the Mobile Inventory Inquiry window. This window is used to process inventory transactions that are entered by technicians. See Process Inventory and Non-Inventory Item Transactions[10].
SMS-1435	Users are now prompted to save the Location window if they attempt to close the window without saving.
SMS-1488	In the SQL stored procedure SMS_Update_Appointment, we've added the modified date, modified time, and modified user fields to the update statement for SV00301. When an appointment is updated in MobileTech, these fields will be populated.

8 https://wennsoft.atlassian.net/wiki/spaces/1804b06/pages/7524500/Enable+Signature+Registration+Keys
9 https://wennsoft.atlassian.net/wiki/spaces/1804b06/pages/7525278/Update+Time+Zone+Data
10 https://wennsoft.atlassian.net/wiki/spaces/1804b06/pages/7532254/Process+Inventory+and+Non-Inventory+Item+Transactions

Case #	Description
SMS-1540	The Maintenance Contract window is now brought to the forefront when adding the contract to the Master Contract from the Assign Contract window.
SMS-1542	The Renew button is now disabled in the Maintenance Contract window when the contract is assigned to a master contract and the billing control is set up by the master contract.
SMS-1576	Users can now edit the telephone number format for the Service Contact Management window by editing the PhoneFormatSetting line in the Dex.ini file. See Update the Telephone Format for the Service Contact Management Window[11] in the Signature Installation and Administration Guide.

11 https://wennsoft.atlassian.net/wiki/spaces/1804b06/pages/7526496/Additional+Information#AdditionalInformation-telephone

<table>
<tr><th>Case #</th><th>Description</th></tr>
<tr><td>Epic:
SMS-1524</td><td>
Inactive Locations or Inactive Customers
We've added logic within Service Management to limit certain activities completed on an inactive customer and/or service address (Location).
On the Service Manager, Location, and Maintenance Contract windows, a display-only Inactive check box has been added to the right of the Location Address ID field that is marked to indicate an inactive location. A Customer ID Inactive check box was also added to the Maintenance Contract window.
<table>
<tr><th>What you cannot do with an inactive location:</th><th>What you cannot do with an inactive customer:</th></tr>
<tr><td>

Service Calls: No new service calls can be created except for MC and/or MCC call types.
Contracts:

No new contracts can be created.
Existing contracts can still be updated as needed, however, existing contracts cannot be renewed.
Contract Quote: A contract quote cannot be changed to a contract.

Master Contracts:

If any of the contracts associated with the master contract have an inactive location, you can still renew the master contract, however, those contracts with the inactive location will not be renewed.

Mass Renew Contracts

A contract cannot be renewed via the Mass Renew Contracts window. While you can display all the contracts, if the customer or location is inactive, the contract cannot be renewed and will display on the Exception report.

</td><td>

Service Calls: No new service calls can be created except for MC and/or MCC call types.
Invoicing
Contracts:

No new contracts can be created.
Existing contracts can still be updated as needed, however, existing contracts cannot be renewed.
Contract Quote: A contract quote cannot be changed to a contract.

Master Contracts:

No new master contracts can be created. The Clear button is disabled so that if you access the Master Contracts window where the Master Contracts window is auto-populated, the window cannot be cleared to create a new master contract.
Existing master contracts cannot be renewed. The Renew button is disabled.

Mass Renew Contracts

A contract cannot be renewed via the Mass Renew Contracts window. While you can display all the contracts, if the customer or location is inactive, the contract cannot be renewed and will display on the Exception report.

</td></tr>
<tr><th>What you can do with an inactive location:</th><th>What you can do with an inactive customer:</th></tr>
</table>
</td></tr>
</table>

<table>
<tr><th>Case #</th><th>Description</th></tr>
<tr><td></td><td><table><tr><td>Invoice on all existing service calls regardless of the status of the service location or bill to location. This includes using the Service Batch Invoicing window.

⚠ If you are changing the Bill To Location to an inactive location ID, when using the Location Address ID lookup, by default, inactive locations are not displayed. However, you can mark the Include Inactive check box and then select Redisplay to show these inactive locations.
You can edit an existing MC/MCC service call, however, you cannot change the call type.
Add new equipment records.
Add new refrigerant tracking records.
Add new meter reading records.
Add new contract quotes, however, you cannot change this to a contract.
A service call can be reopened if the location is inactive, however, the service call will not pull back any un-invoiced costs.</td><td>You can edit an existing MC/MCC service call, however, you cannot change the call type.
Add new equipment records.
Add new refrigerant tracking records.
Add new meter reading records.
Add new contract quotes, however, you cannot change this to a contract.
A service call can be reopened if the Customer is inactive, however, you will not be able to invoice the service call.</td></tr></table></td></tr>
<tr><td>SMS-1528</td><td>We've updated the Mass Contract Renew Exception Report and the Master Contract Renew Exception Report to show the customer and/or location inactive status.</td></tr>
</table>

Job Cost

Case #	Description
JC-41	Users can now view the Billed Amounts for a specific job on a project. On the Project Invoice Entry window, focus on a job line. Select the arrow to the right of Remibursable to open the Project Billing window. Select the newly hyperlinked Retention Due label to open both the Billed Position and Billed Amounts window.

Case #	Description
JC-249	The Job Cost Notes window has been updated to include the Created User, Modified User, and Last Changed date and time. The Note Index field has been renamed to Subject and the Author field has been renamed to Current Owner.
JC-263	The Job Cost Status inquiry window now displays an Unposted Costs column to display unposted cost transactions that are saved in a batch where costs are assigned to a cost element for the job. Select *Unposted Costs* to open the new Unposted Cost by Job window to display unposted cost by job. You can zoom to the originating entry window by selecting the transaction number row and then selecting Transaction Number or Batch Number in the column header. Users have the option to print a new Job Unposted Cost report. See Job Unposted Cost[12] in the Reports guide for a screenshot of the report. The Job Status report has been updated to include unposted costs. See Viewing Unposted Costs[13]. Service call costs within Service Management will not be displayed in Job Cost as unposted costs until such time as the costs are transferred to the job or the job has been billed.
JC-331	We've added the ability to search for a job in the Job Close window. To use the search, under Filters, mark the new Job radio button to enable to search field. You can enter a specific job number or use the lookup button to open the Job Lookup window. In the Job Lookup window, double-click or click and then click Select. The job displays in the Available to Close section if it can be closed.
JC-332	The Project Status inquiry window now displays an Unposted Costs column to display unposted cost transactions that are saved in a batch. Select *Unposted Costs* to open the new Project Unposted Cost by Job window to display unposted cost by job for the project. To view additional job information, you can select the job row and then zoom to the Job Status window by selecting the Job Number header. The Project Status report has been updated to include unposted costs. See Project Status[14] in the Reports guide for a screenshot of the report. The Project Status report now includes the unposted cost information.
JC-366	In the Job Close window, the discount applied to a job is now included in the amount applied so that the job can be closed as expected.
JC-375	The Jobs List window, accessed from the Job Cost navigation list, has been updated to open the .Net Close Jobs window with the jobs auto-populated. If you've marked any jobs in the Job List window and then select the Close Jobs button, the jobs available to be closed will be marked in the Close Jobs window. If you have a saved schedule, you will be prompted to select Yes to load the saved schedule and also add the jobs marked in the Job List or No to clear the saved schedule and only mark the jobs from the Job List window.

12 https://docs.key2act.io/display/1804b06/Job+Unposted+Cost
13 https://wennsoft.atlassian.net/wiki/spaces/1804b06/pages/7530160/Viewing+Unposted+Costs
14 https://wennsoft.atlassian.net/wiki/spaces/1804b06/pages/7524966/Project+Status

Case #	Description
JC-376	We've updated the messaging in the Job Close window to help identify when not all jobs selected were closed. When the Close Jobs button is selected, users may receive one or more of the following messages: • If a batch is created: “Batch Number XXX was created!” • If a batch is not created but ALL selected jobs were closed: “The close job process is complete.”. • If a batch is not created but not ALL selected jobs were closed: “The close job process is complete. X of XX selected jobs closed.” This message will show you the number of jobs closed out of the total number selected. The user would have to view the Jobs Not Available list to see why. • None of the jobs closed: “None of the selected jobs were closed. Review the (Not Available to Close) grid or report for the reasons why each job is not available.”
JC-385	When a contract amount is changed, the date, time, and user ID are now inserted into the JC00114 table.
JC-390	We've updated the error message that displays when recreating a summary that will change historical data for the jobs. Note that the Recreate Summary utility is on a secure menu that requires a password.

TimeTrack

Case #	Description
TT-50	The Time Track Notes window has been updated to rename the Note Author to Current Owner and Modified Date to Last Changed date.
TT-65	Users can now enter time in/time out values in the new Time In/Time Out window accessed from the Time Card Entry window by selecting the clock icon next to the Hours label. The date defaults to the selected day of the week for the current week, however, you can edit this date. If the date is changed, the day of the week is updated on the Time Entry window. Enter the date/time for the time in and time out values and select *OK*. The hour value is calculated and displayed in the Hours field. If an hour value already existing in the Hours field, it will be overwritten with the new value. If you manually edit the hour value, the time in/time out values are not updated to reflect this change and the time in/ time out values print on the Edit List as entered. The time in/time out values entered must be within the batch date range.
TT-84	The payroll posting process has been updated to improve the time required to post transactions to Service Management for Service Invoicing.

Issues Fixed

The following issues have been fixed:

Service Management

Case #	Description
SMS-157	When creating an intercompany service transaction, the Billable checkbox is now marked as expected on the Adjustment to Costs window and in the SV000810 table.
SMS-778	The Contract Coverage Maintenance window automatic refresh after removing a piece of equipment no longer brings a user back to the top of the equipment list. The list displays in the area where the removed equipment had displayed.
SMS-789	When payroll posting in summary and the same account number is used for debit and credits and the payroll transactions are voided, the debits and credits are now reversed as expected.
SMS-879	Updated the Revenue/Cost window so that if the POC or Manual revenue recognition method is used, only the Reconcile Revenue menu option is removed. Users can now access the Recognize Costs and Recognize Billing menu options.
SMS-1128	We've fixed an issue that occurred when doing 3rd party invoicing where the correct billing address was not added to the SSRS WS Service Invoice Summary - Multi Currency and WS Service Invoice Detail - Multi Currency. Both reports will need to be deployed to see the update. See Signature SSRS Reports Setup[15] in the Signature Reports Guide for information on deploying reports.
SMS-1130	When a user edits the Salesperson ID in the Service Credit Memo window, the changes are now saved to the credit memo in Receivables Management.
SMS-1132	The Maintenance Contract Invoice now prints correctly after the contract is renewed.
SMS-1135	When using SOP Invoicing, the posted labor hours now display as expected in the Revenue Cost window.

15 https://wennsoft.atlassian.net/wiki/spaces/1804b06/pages/7528104/Signature+SSRS+Reports+Setup

Case #	Description
SMS-1168	Users are no longer prompted to Save, Discard, and/or Cancel after running the Reconcile process in the Revenue/Costs window. Changes are saved automatically.
SMS-1176	When posting a manual transaction to MC/MCC calls, the Taxable field, Billing Amount field, and Billable checkbox are now set in the SV000810 the same as regular GL entries.
SMS-1185	When adding equipment to a service call, the system now validates that the Location first.
SMS-1186	If using the Contract Number to pull up customer information in the Maintenance Tasking and Maintenance Invoicing windows, we now create all calls associated with the customer. This used to be limited to the sequence number on the contract.
SMS-1188	The Reconcile Cost Audit Report now displays the Actual_Hours.
SMS-1189	The Service Management Notes window now resizes as expected.
SMS-1207	Assigning a task code to a Maintenance Contract (MC) service call, the division and/or contract number remains as expected.
SMS-1224	The Location window is now updating the Customer Name field when a different customer is selected from the Smartviewer.
SMS-1228	Credit Memo invoices on the SV Commission and SV Commissions Detailed Reports now correctly display the commission as a negative amount.
SMS-1244	When printing a service invoice with a purchase order and receipt, only the purchase order line prints on the invoice.
SMS-1269	When creating a new customer from the Quick Customer window, the WSReserved_CB3 checkbox indicator is reserved as expected in the SV00100 table.
SMS-1271	We've improved the performance when updating a customer's global filter in Customer Maintenance.
SMS-1273	After updating an expiration date for a contract billing schedule with a credit memo and billing is recalculated, the billing periods are now created as expected.
SMS-1274	When running the billing schedule for the last year that you have fiscal periods set up, Period2 is now set to the actual number from sv00532.

Case #	Description
SMS-1284	Users will no longer receive the error message "A countrecords operation on table [Not Found] cannot find table" when using the Signature Merge Location Utility.
SMS-1318	The Salesperson ID field is now filled on the historical invoice that is created when manually closing a service call with costs.
SMS-1346, SMS-1397, SMS-1400, SMS-1394	Users can no longer delete a location or address if the address is on a maintenance contract, maintenance contract quote, service call, and/or service call invoice.
SMS-1384	When a PO Number is changed on a master contract, the contracts under the master contract that are on hold now remain on hold. Users had experienced these contracts being released off hold.
SMS-1407	Deleting location records from the Location window now deletes all location data as expected.
SMS-1409	In the Service Invoice window, a call type that does not have Added Rates set up in the Extended Price Setup and the invoice is viewed, the added rate flag is now set only if an Added Rate transaction was added to the invoice.
SMS-1410	A fix was made to ORGSEQNUMBER so the field will only be updated when changing a division on a service call if it is already empty or if the line is not of PO type.
SMS-1414	Users can now use a SharePoint URL when adding an internet/extranet web address in the Attachments window.
SMS-1416	The Microsoft Dynamics GP Mid-Year 2021 Update introduced a table change to SY01500. We've updated table SY_Company_MSTR as users have reported receiving a Get/Change “Number of results doesn’t match the table definition.” error message when attempting to launch WS Utilities.
SMS-1436	The Service Call Work Order SSRS report now displays the correct estimated hours as expected when more than one task was saved on the call.
SMS-1448	We've fixed an issue where users were able to save a new location record in the Location window without all required fields completed.
SMS-1471	In the Merge Location utility window, we've eliminated the Remove Location check box as this was causing issues with records being out of sync with Equipment Management, Signature, and Microsoft Dynamics GP. If needed, users can delete the location from the Location window.

Case #	Description
SMS-1495	You can now import WS_Other_Cost_Sub_Code when a COSTTYPE is set to 5 (Other). The added parameter includes validation and is used when calling the SQL stored procedures SMS_Extended_Pricing_Matrix_Return and wsiSMSJobCostsWork.
SMS-1498	When deleting the batch ID for a travel transaction, the records are now deleted as expected from the SV00810 and SVUnpost tables.
SMS-1499	For travel transactions on MC/MCC calls, the Taxable field, Billing Amount field, and Billable checkbox are now hidden as expected.
SMS-1500	When posting a travel transaction on an MC/MCC call, the Billable checkbox, Billing, and Taxable fields on the SV00810 table are now updated as expected.
SMS-1502	When drilling down on costs for closed MC/MCC calls, the billing amounts and total are now hidden as expected.
SMS-1503	When drilling down to the Labor Cost window for MC/MCC calls, the billing total amounts are now hidden as expected.
SMS-1505	The naming of maintenance invoices on master contracts is now correct. It will take the sum of the billing total to determine if it is an invoice or credit memo.
SMS-1515	We've updated the SWL stored procedure wsiSMSInvoice to pass the Bill To customer id and address code to the Receivables Management invoice.
SMS-1516	We've updated the SQL stored procedure WSMobileCalFieldInvoiceTaxes (called from wsiSMSInvoices) so that all parameters are now using an ISNULL statement to set them 0 (numeric) or blank (string). Users should now have the taxes calculated as expected when the wsiSMSInvoice is called.
SMS-1526	When the Use Stop & Go Lights with Receivables Status is marked in Service Options, the New Call button is now disabled as expected when the customer's receivables status is displayed on the Stop & Go Lights as red in the Service Manager window.
SMS-1532	When a maintenance contract is linked to a master contract with billing control, invoicing is now disabled as expected on the maintenance contract.
SMS-1533, SMS-1534	In the Contract Mass Renewal window, when "Allow renew where billing/revenue is NOT 100% complete" is not marked, if the requirements are not met for a contract and/or a master contract, the Auto Renew checkbox is no longer marked. Contracts will not be automatically renewed if the requirements have not been met unless you mark checkbox to allow this.

Case #	Description
SMS-1536	When batch posting grouped invoices, the SQL Server is no longer locked up. This issue only affected users who installed the W18g522AO hotfix.
SMS-1559	Service invoice numbers will no longer be duplicated when invoice prefixes are not used for service invoicing and maintenance invoicing.
SMS-1572	When renewing a master contract and billing or revenue is not 100% completed, and "Allow renew where billing or revenue is not 100% complete" in Maintenance Options is off (not marked), the master contract cannot be renewed.
SMS-1575	The Mass Contract Renewal Exception Report now includes the maintenance contracts that are on hold.
SMS-1578	When a master contract without billing control is placed on hold, the linked contracts are now also placed on hold.
SMS-1583	We've fixed an issue that occurred where WSCONSTQ starts with 0 instead of 1 in the SV00500 table when assigning a contract to a new master contract.
SMS-1586	When opening a master contract with an inactive customer, the customer name now displays as expected to the right of the customer ID.
SMS-1603	The TTD_Total_Labor and YTD_Total_Labor fields are now updated when posting MC/MCC invoices or manually closing a service call.
SMS-1609	An inventory adjustment is no longer updated in the SV000810 table when an inventory transfer transaction has the same document number.
SMS-1610	When you renew a contract from the Contract Renew window, the historical record now has the correct closed date (SV00501 table) and renewed contract's closed date is no longer populated in the same table.
SMS-1612	An inventory adjustment for a service call can no longer be deleted when deleting an unrelated inventory transfer document with the same number.
SMS-1626	When renewing a master contract from the Mass Renewal window, when the associated contracts fit within the date window of the master, the new date range for the contracts follows the date range of the master contract. This is regardless of the billing control set for the master contract. (This reflects the functionality of renewing from the Master Contract window in regards to the date range of the new contracts.)

Case #	Description
SMS-1627	Users should no longer receive "Error 51143 Equipment ID is not valid" when creating a service call in Schedule and are using the Equipment ID Modifier in Signature.
SMS-1629	The Mobile Vendor Setup window no longer displays inactive vendors.

Job Cost

Case #	Description
JC-276	We've fixed an issue with Standard Job Billing where the RM10601 was missing the Batch ID if the Job Schedule Window wasn't opened during the creation of the job invoice.
JC-277, JC-358	The Total Contract calculation on the following reports has been updated to include the Expected Contract amount. Time and Materials change orders are now reflected in the total as expected. • JC Job Billing • JC Billing Division • JC Job Billing PM • JC Project Billing
JC-293	Job ListView Filters on the Job Cost Signature area page are no longer cleared when performing a software upgrade.
JC-298	The JC30003 Contract_Earned_Curr_Mo column now displays the correct amount after running the Job Close procedure.
JC-299	When posting payroll, users will no longer receive a “Cannot insert the value NULL into column ‘WS_Markup_Percent”’ message when the contract amount and total revised forecast cost fields create a null percentage.
JC-300	Users have the ability to again apply credit memos to all invoices, not just the Job Cost invoice assigned to the credit memo job. Also allows GP credit memos to be applied to project invoices. (This is a reversal of JC-52.)
JC-304	The Job Cost Change Order Master node now updates the Expected Contract in table JC00102 when the change order is a posted fixed change order. (Must be posted and must be a fixed change order.)
JC-307	Users will no longer receive an error message when running the Reconcile Jobs or Reconcile Billing utilities if the job number includes an apostrophe.

Case #	Description
JC-308	When a job is opened and closed in the same period, an entry is now created in the JC30003 (JC_Job_MSTR_Summary_HIST) table.
JC-310	Users can now enter a Posting/Schedule Date that is greater than the system date but still within the current period.
JC-314	SSRS reports now print to both HTTP and HTTPS sites.
JC-320	A lien waiver can now be created if the PO receipt line is in history.
JC-322	When reopening a job that has an apostrophe in the job number, users will no longer receive a syntax error and the job is reopened.
JC-326	Users who enter a note in the Item Transaction Entry window will now be able to view the note without receiving a message that the note was deleted.
JC-327	When a project is inactivated, the jobs associated with the project now display correctly as inactive in the Job Number Lookup window.
JC-328	Running the Reconcile Jobs Utility now recalculates the committed costs as expected.
JC-338	Users who open the Job Close window will now see the available jobs to close as expected. The new Job Close window is no longer assigning jobs to the last user who printed a report from the Job Close window and then exited the window (without marking any jobs to close and “Save Schedule” is not enabled).
JC-341	In the Close Job window, now only the jobs displayed in the Available to Close section are inactivated, as expected.
JC-343	Performance enhancements when posting a batch with a purchase order within Job Costing that included new cost codes with markup.
JC-345	When working with retention amounts within the Subcontractors Retention window, if the Apply amount is greater than the Retention Remaining and Mark All is selected the application will display an error and will not allow you to process the transaction.
JC-348, JC-349	When using the Job Close window, the job is now available to close if Contract Agreement Payment is completely processed or the payment is voided before retention is processed.

Case #	Description
JC-354	For users who have the Posting Options for Revenue Recognition set to None and the Closing Jobs Journal Entry not marked, the message “A batch was not created. Jobs closed may not have had transactions or the jobs had reasons for not being available." no longer displays. Instead, the following message displays “The job process is complete.”
JC-355	Discounts are now calculated as expected on Job Cost invoices if a Master Tax Schedule in Job Cost is saved.
JC-359	Project Billed Position now displays the correct Project Contract Earned amount for jobs that have a contract type of NTE with a posted NTE change order.
JC-361	In the Job Close window, selecting Division as the Filter and then selecting the Filter By field in the Division Lookup pop-up window, the window now performs as expected. Users reported receiving an error message and then Microsoft Dynamics GP crashes.
JC-362	When a job has a cost plus change order with a posted purchase order return, the contract amount and the expected contract amount on the job and change order is now correct.
JC-378	With the Job Cost setup for Revenue Recognition Method set to None, the account index is now validated that it exists, is not inactive, and is a credit line or is an unbilled line or is a Job Cost debit line. When importing through SmartConnect and you select the WS PM Transactions node type, you can now pass the account index in for the Job Cost debit line. (Previously you could pass in an account index only for a credit line or unbilled line.) If your Revenue Recognition Method is not None, then we will not take the passed in account index to go into the Job Cost debit line (it will default from the cost code or division).
JC-379	When a single line project credit memo has a job matching job in a project invoice, we will now show the other job lines from the invoice when applying the credit to the invoice.
JC-384	Users can now edit the Reminder Date on a Job note.
JC-394	For POC users, when using the .NET Job Close window, an error message no longer displays that indicates the prior period needs to be closed when displaying jobs for an open period that already has the prior period closed.
JC-403	In the WS Transaction Entry window, users should no longer receive the error message "Invalid data type for arithmetic: 15" after entering a cost code.

TimeTrack

Case #	Description
TT-24	When having Use Average Salary Labor Rate is marked, TimeTrack export is now exporting all of the transactions as expected.
TT-85	Fixed an issue where an error occurred when posting payroll at the execution of the SQL procedure K2aSignPostToService.
TT-88, TT-109, TT-108	Job Cost transaction types (time card entry and group time entry) and imported payroll transactions for jobs now have the ADDRESS code added to each record.
TT-104	Empty TimeTrack batches are no longer created from MobileTech when a technician creates a labor transaction that errors out and does not create the transaction.
TT-106	The Manager Approval check is now only being run against batch(es) selected for editing and committing.
TT-110, TT-111	Users will no longer receive an Invalid Object error message after selecting OK in the Time Card Entry window.