Signature 2021 (18.04b06) Service Pack 1 Readme

Release Version: 18.04b06 g628
Release Date: July 2022 **CONTENTS**

Signature Installation

> ⚠ **IMPORTANT:** You must be on the Microsoft Dynamics GP Mid-Year June 2022 (18.4.1461) release before installing Signature Service Pack 1 (18.04b06 g628).

You can upgrade to Signature Service Pack 1 (18.04b06 g628) from Signature 2018 R3 (18.00b03g310) or higher. Verify version information by checking the About Microsoft Dynamics GP window. If you are not on this version, do not install Signature.

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 Service Pack 1 (18.04b06 g628) is compatible with the following:

- Microsoft Dynamics GP Mid-Year June 2022 (18.4.1461) release
- Dexterity 18.00.0028.000
- Alternate Window and Report Manager 18.04b06
- eOne SmartConnect 21.1.0.763
- eOne SmartList Builder 18.04.0040
- Signature Equipment Management 18.04b06 g605
- Signature Product Registration
- Signature Product Registration 2018
- 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 2.5.7

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:

- 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 Term 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.
    - 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
    - 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
- **SmartConnect users:**

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1 https://wennsoft.atlassian.net/wiki/spaces/1804b06/pages/7524500/Enable+Signature+Registration+Keys
2 https://wennsoft.atlassian.net/wiki/spaces/1804b06/pages/7526908/Refrigerant+Tracking
3 https://wennsoft.atlassian.net/wiki/spaces/1804b06/pages/7530870/Choosing+Service+Options

- If you are upgrading to Service Pack 1 from 18.04b06g626, you do not need to install or set up the nodes again.
- This release requires SmartConnect nodes to be re-installed if this is a **new installation**, 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

Service Management

Case #	Description
SMS-1971	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[4] and Choosing Service Options[5]. New calculations for the Refrigerant Tracking Leak Rate Analysis Methods in the Service Options Setup window: • **Annualized** The annualizing leak rate calculation method is as follows: *Leak Rate (%) = (**pounds of refrigerant released** / pounds of refrigerant in full charge) x (365 days/year / short of #days since refrigerant added OR 365 days) x 100%* If the owner/operator selects to use the annualizing method, for the first refrigerant released in the calendar year 2019 the second term would be 365 / 365 (or "1"). For subsequent additions, the second term would be 365 divided by the shorter of the number days since refrigerant was last released or 365. • **Rolling Average** The rolling average method is as follows: *Leak Rate (%) = (**pounds of refrigerant released over past 365 days** / pounds of refrigerant in full charge) x 100%* If the owner/operator selects to use the rolling average method for refrigerant releases in the calendar year 2018 the numerator would be the pounds of refrigerant released since the shorter of January 1, 2019, or the last successful follow-up verification test, if one was conducted in 2019. For releases in 2020 and beyond, the numerator would be the pounds of refrigerant released since the shorter of 365 days or the last successful follow-up verification test.

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4 https://wennsoft.atlassian.net/wiki/spaces/1804b06/pages/7526908/Refrigerant+Tracking
5 https://wennsoft.atlassian.net/wiki/spaces/1804b06/pages/7530870/Choosing+Service+Options

Case #	Description
SMS-1975	When importing a service call in SmartConnect, if you do not pass in a Bill To customer ID and Bill To address code we are now filling the information in this order: 1. If the call type is MC or MCC and you pass in a contract number, the bill to information will come from SV00500. 2. If those are empty or if it is not a contract call, then we will get the bill to information from SV00200. 3. If they are still empty, the primary bill to address code comes from RM00101 and the customer will be the one passed into the procedure. 4. If these are still empty, it will default the bill to information based on the customer and address code passed into the procedure.

Job Cost

Case #	Description
JC-458	We've updated the Signature Credit Apply window regarding applying project credit memos to project invoices. • When you select the checkbox, if the job on the invoice matches the job on the credit memo, it will default in the amount from the credit memo. If the Remaining Amount is less, then it would use the Remaining Amount. • You can override the default up to the Remaining Amount as long as the total is not more than the unapplied amount on the credit memo. ⚠ The window no longer displays the Credit Memo Amount and CM Unapplied Amount columns as these columns were causing display issues if amounts were applied and then unapplied.

Case #	Description
JC-460	The .NET Close Jobs window has the following functional changes. See Closing a Job[6], Additional Job Close Setup[7], and Signature Action Lists for JC[8].

- **The process timeout has been increased to 120 seconds when redisplaying or filtering jobs available to close.**
- **Marking/unmarking jobs in the Available to Close grid will insert/delete from the k2aAddInJobCloseSchedule table immediately.**
  - If the Save Schedule option is NOT ON, the marked jobs will stay in that table until you run close, unmark the jobs, or close the window.
  - If the Save Schedule option is ON, the marked jobs will stay in that table until you run close or unmark the jobs. The jobs lines are automatically saved since they are in the table already.
  - A user could have multiple jobs marked for different schedule/posting dates in table k2aAddInJobCloseCloseSchedule.
- **All jobs that display in the window are no longer temporarily made inactive.** This provides an enhanced performance boost for users who also are using MobileTech.
- **Selecting the Redisplay button will reload the list, keep the marked jobs, and those marked will appear first in the list.** A user can mark jobs they find and then filter differently to find others. Each time the user clicks Redisplay the list will rebuild and show all marked at the top along with other unmarked available jobs that fit the filters on the window. A user will not lose the jobs that they have marked if they filter differently. To discard wrongly marked jobs they have to unmark them or use Unmark All.
- **If using the Save Schedule setup option, the Existing Schedule button now functions the same as Redisplay.** See Additional Job Close Setup[9].
- **The Existing Schedule button only displays when the Save Schedule option is on.**
- **Updates to the Available or Not Available Reports:**
  - Filter fields have been added as parameters to the report.
  - When printing, the filters selected in the Close Job window are displayed at the top of the report window.
  - The Available to Close report will show marked jobs regardless if they fit the filter criteria passed from the window.
- **Updates when opening the .NET Close Job window from the Job List** (see Signature Action Lists for JC[10] and Additional Job Close Setup[11]):
  - **If Saved Schedule option OFF** - When a user marks a job in the Job List and then opens the Close Job window. The window will load with that job marked and other jobs available to close. If the user did not pick a job and clicked to open the Close Job window, the window will open with nothing displayed, which is the current functionality. Select Redisplay to populate the window.

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6 https://wennsoft.atlassian.net/wiki/spaces/1804b06/pages/7530183/Closing+a+Job
7 https://wennsoft.atlassian.net/wiki/spaces/1804b06/pages/7532581/Additional+Job+Close+Setup
8 https://wennsoft.atlassian.net/wiki/spaces/1804b06/pages/7529401/Signature+Action+Lists+for+JC
9 https://wennsoft.atlassian.net/wiki/spaces/1804b06/pages/7532581/Additional+Job+Close+Setup
10 https://wennsoft.atlassian.net/wiki/spaces/1804b06/pages/7529401/Signature+Action+Lists+for+JC
11 https://wennsoft.atlassian.net/wiki/spaces/1804b06/pages/7532581/Additional+Job+Close+Setup

Case #	Description
	• **If Saved Schedule option ON** - When a user marks a job in the Job List window, the job will be added to the table, and display as marked in the Close Jobs window. The marked jobs will remain marked. The user will not receive a dialog to delete the already saved schedule. If the user doesn't pick any additional jobs, the window opens with what the user saved before or just all available jobs (even if not marked). • **Removed the Save Schedule button from the Close Jobs window** since records are stored differently and directly to the k2aAddInJobCloseSchedule table when a job is marked. • **Column sorting has been added to the Jobs Available to Close section.** Select the column header to sort ascending, and select again to sort descending.
JC-463	We've enhanced the speed performance for closing jobs which will also improve closing months and running the recreate summary process.

Signature Fixes

Service Management

Case #	Description
SMS-1961	The alternate Customer Maintenance window is now compatible with the Dynamics GP 2022 Mid-Year Canadian Payroll Tax Update.
SMS-1964	The Unit of Measure field in SV000810 is now being filled in when processing an SOP inventory transaction from MobileTech.
SMS-1966	We've fixed an issue where SMS_Pricing_Matrix or SMS_Pricing_Matrix_Markup was not using the default Address Code that was selected in Invoice Options (Bill To or Service Location).
SMS-1967	In the Mobile Inventory window, users can now view the error and/or delete the line when the transaction has an eConnect error.
SMS-1968	We've fixed an issue that occurred when posting payroll to Service Management and there are already transactions in the SV000810 table that are not labor. Users were receiving a "Conversion failed when converting the varchar value xxx to data type int". (The xxx value depends on the existing transaction number on the service call.)
SMS-1969	We've updated the k2aSigPostToService SQL procedure to include additional fields including SV_Language_ID, Time_Zone, and all the WS_Reserved checkbox fields. Users will no longer receive the error message "An error occurred during the execution of SQL procedure k2aSigPostToService".

Case #	Description
SMS-1970	We've fixed a registration issue when using the GP Web Client to access Signature windows.
SMS-1972	We've fixed an issue where reconciling Billing MC contracts was not setting the TTD field correctly with billing in multiple years. The Revenue/Costs and Contract Cost Life to Date windows now display the correct billed amount.
SMS-1973	When creating maintenance invoices on master contracts where the credit memo is in the same period as a posted invoice and the invoice amount is more than the credit memo, credit memo numbering is now used as expected.
SMS-1974	We've increased the MCC Call Creation process performance to significantly decrease the processing time.
SMS-1976	The Billing_Amount is now filled as expected in the SV000810 table for mobile purchase orders (originating from MobileTech) when using Extended Pricing with a 0% markup.
SMS-1977	The SSRS-Maintenance Contract Profitability pull through report is now defaulting the starting date as 2022.

Job Cost

Case #	Description
JC-459	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 are now showing a billing amount in the Project Transaction Level Billing window.
JC-464	You can now use the last day of year 12/31/xxxx as a schedule date when the period is OPEN. Users had experienced an error message when selecting this date and attempting to close jobs.

TimeTrack

Case #	Description
TT-145	The Fixed Asset batches are now created as expected when committing fixed asset transactions when Reimburse Expenses Through Accounts Payable is selected for expense/travel transactions as well as Integrate to FA Management in TimeTrack Setup Options.
TT-147	When a labor transaction is created in MobileTech and synced, the performance has been enhanced, and all fields are filled as expected.

Case #	Description
TT-148	When a travel transaction is created in MobileTech and synced back to TimeTrack, the billing amount is now calculated as expected. This affected users with no billing rate set up in the Invoice Travel Setup window and using standard pricing.
TT-149	If you have TimeTrack setup to allow the modification of pay rates and Use Average Salary Labor Rate is marked in setup, when you create a TimeTrack transaction with a $0 pay rate, the Edit Pay Rate window will no longer attempt to open so that the transaction may now be saved.
TT-150	When a labor transaction is created in MobileTech and synced back to TimeTrack, the Local Tax field is now filled in the WS10702 table as expected.
TT-152	A transaction note created in Excel TimeTrack will now be saved to the JC00501 table when the transaction is committed in TimeTrack.
TT-153	In the TimeTrack Setup Options window, if you've marked both: • Create a GL Journal Entry for Unbilled Transactions • Create Expense/Travel Transactions Reimburse Through Accounts Payable The labor unbilled (UN) batches and associated GL transactions are now created as expected. The naming convention is "UN" and then the TimeTrack batch name. The associated GL unbilled transactions are also created.