Signature 2020 (18.03b05) Readme

Release Version: Signature 18.03b05

Release Date: November 2020

This document includes these sections:

Signature Installation

IMPORTANT: You must be on the Microsoft Dynamics GP October 2020 (18.3.1173) release or U.S. Year-End Tax Update 2020 (18.3.1200) release before installing Signature 18.03b05.

You can upgrade to Signature 18.03b05 from Signature 2016 R3 16.00b3g315 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 Signature 18.03b05.

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, Job Cost Portal, 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 18.03b05g522 is compatible with the following:

- Microsoft Dynamics GP October 2020 (18.3.1173) release or U.S. Year-End Tax Update 2020 (18.3.1200) release
- Dexterity 18.00.0028.000
- Alternate Window and Report Manager 18.03b05
- eOne SmartConnect 20.18.1.49
- eOne SmartList Builder 18.03.0037
- Signature Equipment Management 18.03b05g507
- Signature Product Registration
- Signature Product Registration 2018
- eTimeTrack Web Service 16.1.5
- Job Import 16.1.3
- Excel TimeTrack Client 16.0.1.8
- SmartConnect Integration Manager 18.03b05

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
- Job Cost Portal website application 16.0.01.01

MobileTech

- For additional compatibility information, see the MobileTech 8.0 SP 2 readme documentation.

Schedule

- For additional compatibility information, see the Schedule 4.5 SP 2 readme documentation.

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.

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.

IMPORTANT:

- **SmartConnect users:** 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 with the Signature release.
  - Process Service Invoicing is being 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.
- **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 web sites, 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-64	Users can now select to use a SQL job to automatically roll service calls forward. A new Use Auto-Roll SQL Job checkbox has been added to the Service Options window in Service Management. This option is disabled until you mark the Auto-Roll Calls Forward checkbox. ⚠ Please evaluate the maintenance processes that are being run on your SQL Server after standard business hours. If you are running a backup process during the early morning hours or performing other file maintenance, please update the default start time of the Call Roll Forward SQL Job to follow those processes.
SMS-485	In the Mass Close/Complete Utility window, the Call Type filter field now displays the *Short Call Type*, instead of the Call Type Description. For example, when you select the Call Type lookup and then select ANNUAL SERVICE, the Call Type field displays "AS" instead of the full description. The reason for this update is that if the editable Call Type Description field is updated, service calls that had the previous description won't display. The Short Call Type field cannot be edited.
SMS-488	When posting a progress billing invoice from a service call with a Fixed Quote Contract, the service call is now left OPEN and the status is OPEN.
SMS-539, SMS-695	We've added Equipment Description and Equipment Type display-only fields to the Contract Task Maintenance and Service Call Task Codes windows. (This information is entered on the Equipment Master window.)
SMS-560	We've added a Disable Field Invoicing checkbox in the SMS Customer Maintenance window for MobileTech users to disable field invoicing for specific customers. If marked, the MobileTech technician cannot create a field invoice for that customer. This checkbox only displays if Field Invoicing and Field Payments are registered, and UseFieldInvoicing is set to True in the MobileTech setup options.
SMS-577	The Service Manager Notes window has been updated to include the Created User, Modified User, and Last Changed date and time. The Author field has been renamed to Current Owner.

Case #	Description
SMS-593	Users can now reconcile costs, billing, and revenue from the Contract Revenue/Costs window for annual (or less) contracts. The Reconcile feature can be password protected in the Password Setup window by marking *Reconcile Contract in MC Window*. A new Reconcile option has been added to the menu bar. When selected, a menu drops down where you can select one of the following:

- **Reconcile Cost**
  Runs through the Open Maintenance Contract table (SV_Maint_MSTR) and Periods Cost Buckets for Contracts table (SV_Contract_Detail_Summary) and updates labor Hours and Cost amounts. The Costs to Life window is also updated.
- **Reconcile Billing**
  Runs through the Billing Schedule table (SV_Contract_Billing_Schedule) to accumulate the totals and updates the Billed amount.
- **Reconcile Revenue**
  Runs through the Revenue Schedule table (SV_Contract_Revenue_Schedule) to accumulate the totals and updates the Revenue Recognized amount.

> ⚠ This procedure only supports the Revenue Schedule method. This does not support POC or Manual Revenue Recognition.

Case #	Description
SMS-594	Service Invoicing users now have the ability to reopen a manually closed service call and have the option to also pull the costs back. When reopening a service call, a reversing journal entry is created and a reversing batch is created. The batch naming convention is the first 5 characters of the user name + MNLREOPEN. (For example, LESSOMNLREOPEN.) Considerations: • Reopening a close service call is for Service Invoicing only. You cannot reopen a service if you are using SOP Invoicing. • Only the latest cost transactions can be called back on a manually closed service call. If a service call was manually closed, then invoiced without pulling back unbilled costs, new costs are added, and the call was manually closed again, only the cost transactions that were *last* manually closed can be pulled back. • Only the most recent unbilled invoice is pulled back, regardless if a valid invoice has since been posted. The unposted invoice history record is removed and a new invoice is created in the Open Invoice table. • When using an extended pricing matrix: • Unbilled fixed costs that were manually closed and not billed are recalculated when the costs are pulled back into the Transaction Work table from the Cost History table. • Any other overhead costs that are calculated based on other types of costs will also be calculated and added to the Transaction Work table. • For fixed costs (for example Trip Charge, after reopening the service call, you will need to open the Invoice window so that the rate is added back to the open call invoice. • Verify the Divisional accounts are correct for the reopened service call. • Billing amounts are recalculated and based on the rate on the actual day you reopen the service call. These amounts may be different than when you closed the service call. This includes changes made to extended pricing, labor rate groups, SOP inventory, unit prices, and/or travel rates after closing the service call. • After entering a markup percent for the subcontractor Added Cost window and haven't billed these costs, when the call is reopened, the billing amount is recalculated using the pricing matrix, not the markup percent entered in the Added Cost window. • If you modify a billing amount (override) and the call is reopened, the pricing matrix is used to calculate the billing amount. • When reopening a service call that has an SOP transaction, the system will first look at the customer record, then the RM setup, and then the inventory item for a price level. If the price level has not been set up and was manually selected on the SOP Order/Invoice line, the billing cannot be computed and will be $0.
SMS-629	When installing or upgrading Signature, an UNKNOWN mfg ID is now added to the Equipment table (SV00400). This ID is added to an equipment record when the MFG field is left blank. Users can clear this field prior to saving if it intentional to have this field blank.
SMS-722	When editing a Contact in MobileTech, the Location Record in Service Management is updated as expected.

Job Cost

Case #	Description
JC-028	We've added Transaction Entry buttons to the Job Status window so that users can easily open the following windows: Purchase Order Entry, Receivings Transaction Entry, Payables Transaction Entry, Payroll Transaction Entry, Inventory Transaction Entry, and/or Sales Transaction Entry. Users will need security access to the Signature Alternate Forms (not Equipment Management) and the transaction windows respect Microsoft Dynamics' user licenses.
JC-029	Users can now reprint a posted project-level SSRS invoice for an open job from the new Project Billing Inquiry window accessed from the Project Status window. Inquiry > Job Cost > Project Status and then select the new Billing button. This feature does not support reprinting a project level invoice when the project has a billing type of Project Allocated Revenue.
JC-043	Users now have the ability to mark/unmark all transactions when doing Project Level Transaction-Level Billing.

TimeTrack

Case #	Description
TT-008, TT-009	If your payroll posting is taking a significant amount of time to post due to a large transaction volume, you can now set up Microsoft Dynamic GP's Distributed Process Server to send the payroll posting process to another computer on your network. This reduces the workload of client computers and improves posting performance. The client computer used for data entry will be immediately available to perform other tasks, so you don't have to wait to continue working while the task is completed, or work more slowly while the task is completed in the background. For information on how to set this up, see the Microsoft Dynamics GP System Administrator documentation, specifically Part 3: Distributed Process Server. https://docs.microsoft.com/en-us/dynamics-gp/installation/systemadminguide#part-3-distributed-process-server When setting this up for TimeTrack payroll posting, in the DPS Setup window, select Third Party and then mark the Remote checkbox to the left of Payroll: Signature Post.
TT-010	We've added two new buttons to the Signature Payroll Post window - a *Mark All* and an *Unmark All* button. (Transactions > Payroll > Signature Payroll Post) This lets you quickly mark (or unmark) all batches that you want to post. The Mark/Unmark buttons will not affect batches that are already marked by other users.

Case #	Description
TT-014	The Signature Registered Users window has been updated to require the Email Address field if the user has a manager listed in the Manager ID field. The assigned manager's user row will also require that the manager's email address be entered. A red asterisk * is displayed if the manager's email address is missing. This requirement is only in effect if the TimeTrack checkbox is marked in the Signature Registered Users window and the Require Manager Approval and E-Mail Notification options are marked in the TimeTrack Setup Options window. (Microsoft Dynamics GP > Tools > Setup > TimeTrack > Setup Options) You can exit the Signature Registered Users Setup window without entering the required emails, however, you will be prompted to do so the next time you open the window. You can quickly find the users missing emails by using the new by Missing Emails sort option.
TT-028	The Signature Registered Users window now remains open after saving the window so that you can continue with editing the window.
TT-041	The TimeTrack Export performance has been enhanced to reduce processing time.
TT-063	The Time Sheet Edit List and WS Commit Report have been updated to include a message that indicates "This transaction has been approved, however other transactions for this employee have not been approved." This message displays after the approved transaction on the reports.
TT-071	Users can now enter time for inactive jobs in Clock. The Edit List will display an error message for the time entered against an inactive job and someone in the back office will need to fix the job.

Signature Utilities

Case #	Description
SMS-64	The new SQL Auto Call Roll Forward utility creates the SQL Auto Call Roll Forward job that works in conjunction with the Setup Options in Service Management (Auto-Roll Calls Forward and Use Auto-Roll SQL Job).

Issues Fixed

The following issues have been fixed:

Service Management

Case #	Description
SMS-154	When filtering by Billing Customer in the Service Batch Invoicing window, if service call was saved without a Bill Customer, the filter using the Customer on the service call.
SMS-158	The system no longer freezes up when posting Receivables batches from Receivables Transaction Entry and then closing the window.
SMS-243, SMS-518	If you change the Call Type from T&M to MC, stranded journal entries based on overhead on Labor transactions are no longer created if the Invoice Options are not marked in setup.
SMS-261	The Sales Transaction Entry window now displays the credit limit warning if a second SOP transaction line is added to an SOP billing type job. It was reported that a user updated a customer's credit limit prior to creating the transaction and the exceeded credit limit warning was not displayed.
SMS-385	After clearing the Contract Maintenance window that was accessed by zooming on the Contract field, the Contract Number lookup now displays the open contracts available for the customer.
SMS-434	The Billable and Taxable checkboxes now display as expected in the Adjustments to Costs window when Enable Task-Based Expense Entry is marked in the Service Options window. Additionally, if the Billable field is unmarked, the Billing Amount field is disabled. If Billable is marked, the Billing Amount field displays based on your settings.
SMS-457	When a maintenance contract (MC) call is created, the Bill To customer and location from the contract now default on the call.
SMS-466	We've made the Master Contract ID column wider in the Escalation Posting window so that the entire ID displays.

Case #	Description
SMS-478	The default GP account or changed account remains when transferring to a shipment or shipment/ invoice. Users were experiencing the defaulting account number changing to a service account number when transferring to a shipment or shipment/invoice. This occurs only with the following setup options: • Invoice Options: Create COGS Distribution for Invoices is not marked. • Service Options: Allow Editing of the SMS GL Account on PO Line Items is marked.
SMS-482	When assigning an equipment type to a new equipment record, the information now defaults from the equipment type as expected.
SMS-483	When generating MCC calls, the bill to customer and address now default to the bill to customer and bill to address from the contract.
SMS-515	When an inventory item and a non-inventory item are submitted from MobileTech on the same service call, if the general entry batch is deleted before the SOP batch is processed, the line item in the SV000805 is no longer deleted.
SMS-531	When using Signature Utilities to import the Contract Task Master, equipment now displays correctly in the Contract Coverage window.
SMS-561	The Bill To information now auto-populates when the Call Type is changed when creating a service call. For example, if an existing call type is changed from MC to another call type like T&M, the Bill To values are updated to reflect the default Bill To values from the Location (if this exists). If those are empty, the Bill To information on the Customer record is used. If that is empty, then the Customer/Location values default to those on the Service Call.
SMS-565	We've fixed an issue that occurred with users who use the MANUAL Revenue Recognition method and attempting to build checks. Users will no longer be prompted to set up maintenance accounts.
SMS-571	When editing a document attachment in the Document Maintenance window after using the Move Location Utility or Move Service Call Utility to move to a different customer, you are able to edit the document attachment description and the file section is disabled as expected.
SMS-574	An employee ID can now only be associated with one Technician ID.
SMS-649	When a maintenance contract is generated, and the contract is assigned to a master contract without billing control marked, the invoice now has the bill to customer and address code from the contract as expected.
SMS-659	The Time Stamp Inquiry window was updated to gray out all the fields as the data is display-only for all the fields in the window.

Case #	Description
SMS-666	When using Allow Editing of the SMS GL Account on PO Line Item, the correct ACTNDX_DR is now used.
SMS-668	Backing out a journal entry is now reversing the Billing Amount field sign and the transaction quantity as expected.
SMS-680	When printing a maintenance contract invoice, the footer now correctly displays the page number.
SMS-683	Tax calculations are now correct when creating a master contract invoice to Receivables with a combination of invoice and credit billings.
SMS-705, SMS-708, SMS-761	When opening the Revenue/Cost window, a comparison of current Forecast Costs/Hours to Actual Costs/Hours is performed and if the Current Cost exceeds the Current Forecast, the Forecast is adjusted. An indicator displays when the Forecast is adjusted. Additionally, if the Current and Original Forecast is currently $0.00 and you set a value, then both the Original and the Current Forecast amounts are set to that value. If the Original Forecast is <> $0.00 then no future updates to the Forecast will update the *original* Forecast values.
SMS-720	When creating a correcting journal entry when using multicurrency, the Product Indicator, Service Call/Job ID, and Cost Code fields are filled as expected on the correcting entry.
SMS-741	Updated customer logos now display as expected on SSRS reports.
SMS-748	The Billable checkbox is now marked as expected when a Signature Transaction Entry with a billing amount in the Adjustments to Cost window and the Billable_Check_Box field in table SV000810 has a status of 1.
SMS-762	When doing a PO return to a purchase order that went against a service call (or a job) and the inventory item on the purchase order uses bins, the inventory and bins are unaffected with the return. (The Bin Quantity Entry window no longer opens.)
SMS-770	The calculated fields in the Master Contract Revenue/Cost window now update as expected when the window is opened.
SMS-771	Invoicing a service call or MCC call now only adds an equipment ID to the SV00815 table if the equipment ID was added to the initial transaction.
SMS-773, SMS-774	The year drop-down lists for MCC Calls and Recognized Revenue now display the current year for users who have fiscal years that are not based on the calendar year when the fiscal year containing the current year is closed.

Case #	Description
SMS-780	The billing amount is now correct if you edit the transaction hours in the Service Transactions window.
SMS-785	The Move Utility cannot be used if the location is on a maintenance contract.
SMS-787	Users can now select a different Bill To Customer location as expected when creating a new maintenance contract.
SMS-788	When Global Filtering is turned off, when the Bill To customer is selected on the new service call, the Bill To lookup window now displays all the Bill To customer's locations as expected.
SMS-792	When the date is cleared in the Task Schedule window, the "Invalid month '0' in date function. Script terminated." error message no longer displays.
SMS-798	When renewing a multi-year contract after a scheduled task date was updated, all scheduled tasks are now added as expected to the renewed multi-year contract.
SMS-801	The Master Contract Revenue Cost window now displays the Contract Revenue percentages as expected.
SMS-810	On the Inventory Transaction Inquiry window, the Transaction Type radio button was added and the Unbilled checkbox label now displays.
SMS-812	On the Transaction Entry Zoom window, the Back Out By JE field label now displays next to the field.
SMS-826	If a primary Bill To Address is set up in the customer RM record but is NOT set up as a service location, the Bill To address cannot be added to a service call.

Job Cost

Case #	Description
JC-021	We've updated the performance of selecting the Product Indicator in the Payables Transaction Entry Distribution window. Originally an Offset Account check was performed when the window was opened. This check has been updated to validate after the job number is entered so that the check only runs on that job's division.
JC-052	The amount remaining is now reflected correctly on the job when a credit memo is applied as payment.

Case #	Description
JC-097	The job import process was updated to reduce the import process time.
JC-118	We've fixed an issue that allowed a Drop Ship Purchase Order on a Purchase Order Invoice to be posted against a closed Job Cost period. This caused the JC_Job_MSTR to not be updated properly and the summary transaction was not created.
JC-123	A Job Cost User Defined Bill Code invoice now logs total sales amount when the bill code is excluded from sales tax and when only the non-taxable portion is invoiced.
JC-130	Project Invoice Entry invoice that uses a billing type of Project Bill Code now logs the total sales amount when the bill code is excluded from sales tax, regardless if only the non-taxable portion is invoiced or if it is included with another element.
JC-132	We've fixed an issue that allowed a user to create a return on a closed Job.
JC-133	The Job Cost Audit report has been updated to display any changes to the cost code description.
JC-143	We've updated the RPO Revenue Entry window to prompt users to either post the RPO Revenue Entry build or to remove the build when closing the window without posting.
JC-178	The Rate_Per_Unit is now calculated and filled and the Expected Contract, Anticipated Margin, and Margin Percent are now correct after changing the profit type to 9 or from 9 to another code in Job Maintenance and posting the GL batch.
JC-183	When using the Move Location Utility, if the related GP Address ID associated to the Service Location you are attempting to move is assigned as the Job Address for any open or closed Job, the address is not removed from RM00102.
JC-184	The Job Cash Receipts inquiry window now only displays the cash receipt payment transactions.
JC-187	We've fixed an issue where users were receiving an "Unhandled script exception. Illegal address…" message that occurred when using Lockbox and applying payments to Job Cost invoices. This fix will pull the Original Amount information from the Apply Sales Documents window if the window is open, otherwise, the Original Transaction Amount will be pulled from the RM_Cash_WORK (RM10201) table.
JC-190	If you are not utilizing all cost code segments, you have Update If Exists marked, and you import data updates to records that already exist, the primary key violation error message no displays.
JC-197	The Unit Bill Rate is now calculated as expected on the Unbilled Cost report for Jobs with transaction-level billing after the Profit Type is changed.

Case #	Description
JC-199	The Percentage-of-Completion (POC) Journal Number is now auto-generated to prevent the possibility of a user entering the same transaction number in the same month/year.
JC-206	Users can now apply an unposted project-level credit memo to a posted project invoice.
JC-207	The Billing Transaction Inquiry window correctly displays the remaining amount after applying a Sales Order Processing return.
JC-209	For users who import using the wsiJCChangeOrdersDetailMSTR, the following fixes have been made: • The import adheres to the Estimate Cost by Period posting setup option. • A parameter for the Short_Description field has been added. For the first record, we ignore this and put "original estimate". Subsequent transactions in JC01003 will use the parameter. • The import now aligns with the setup in Microsoft Dynamics GP for the number of decimal places in the table so the CO_Est_Amt_Per_Units field in JC01002 has the correct number of decimal places.
JC-212	The Project Billing Inquiry window now displays chronologically with the oldest date at the top.
JC-213, JC-231	The AIA report now correctly reports the work completed amount if more than one job was on the same project with a bill type of Project Bill Code; and each job had the same bill codes but with different descriptions and Total Billable Amounts.
JC-221	After deleting a Project Cost Plus Billing Invoice batch, the JC20002 table is updated as expected. The Billed Transaction field is set to 0 and the deleted invoice is removed.
JC-222	When more than one payment is received on a contract agreement, the Subcontractor Transaction Detail SSRS report no longer duplicates the contract lines.
JC-229	The AIA report now correctly reports the Retention on Continuation amount after the retention had been paid. The AIA report displays the total retainage on page 2 and this matches the amount on page 1. (Provided that no retention is paid against a job until the end of the job, the retainage per bill code will display appropriately. After the retention is paid, the retention is split between the bill codes.)
JC-230	Tax is now calculating correctly for retention on Contract Agreement Payments when part of the payment is allocated to a negative balance change order.
JC-234	The Open Closed Jobs window threshold has been increased to 100,000 jobs.
JC-243	For Job transaction-level invoices, the Show Credited Transaction checkbox is now functioning as expected. When marked, the transactions with a billed invoice and credit memo number display.

Case #	Description
JC-244	When creating a shipment/invoice in the Receivings Transaction Entry window that only has freight and taxes added, and this is saved to a batch and then Series Posted, the posting no longer hangs at 100%. If a transaction level posting is attempted, a "division by zero" error is no longer displayed.
JC-250	When creating a payables transaction, when re-entering the Distributions window, the Job Number field no longer clears out.
JC-254	When posting a payables transaction batch in the Payables Batch Entry window, users no longer experience an erroneous message indicating there are no transactions in a batch, yet the batch posts as expected. This message only occurred for users using workflow to approve payables transactions.
JC-255	In the Job Status window, actual hours on the job are no longer doubling when multiple change orders are posted using the same cost code.
JC-257	Users can no longer reprint a PAR invoice as the amounts are based on when the invoice is reprinted.
JC-265	Users who save transactions to a batch in the Job Invoice Transaction Entry window, change to a different batch, and then delete the original batch - the transactions are no longer removed from the JC10504 table.
JC-269	The Job Original Contract and Expected Contract Amounts are now correct when a fixed change order is created for a Cost Plus/NTE job.
JC-272	The SQL Stored procedure wsiJCInventoryWork has been updated to include a SmartConnect node so that the IVIVOFIX field in table IV10001 with the @I_vAccountIndexArray21 parameter value.
JC-274	When creating a credit memo for a PAR project, the duplicate key values error message no longer displays.

TimeTrack

Case #	Description
TT-013	In the Manager Approval window, the lookups for disabled fields have been removed as changes for the disabled fields are not allowed.

Case #	Description
TT-033	Users who edit a MobileTech time entry and then create a manual entry for the same employee no longer experience the MobileTech time entry's appointment number to display on the new manual entry.
TT-036	If a transaction number has already been used in WS30702, an error message now displays and the transaction will not be committed.
TT-038	The Act Labor Cost TTD + Markup amount is now rounding as expected to two decimal places for profit types 3, 4, 5, 8, and 9.
TT-039	Payroll transactions are committed as expected if linked to a service call.
TT-061	After committing a batch with fixed asset transactions, the batch can now be deleted from payroll.
TT-062	Batch names with apostrophes can now be committed as expected.