WennSoft

Signature

Signature Utilities Guide

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Signature Utilities Introduction

Signature Utilities is a utility program that is used to import data into Service Management and Job Cost and to upgrade data files. It also includes file maintenance utilities. The Conversion utility is part of the Signature Utilities program, but is performed as part of the Signature Products upgrade process. The Conversion utility is documented in the *Upgrading Signature products* section of the *Signature Products Installation, Upgrade, and New Features Manual*.

> ⚠ Signature Utilities is separate from the utilities available in Service Management and Job Cost.

Signature Utilities Setup

This section provides the necessary steps for setting up Signature Utilities.

> ⚠ Signature Utilities is installed using the Signature Products installation wizard. If you did not install Signature Utilities when you installed Signature products, refer to the *Installing Signature products* section of the Signature Products *Installation Manual* for instructions.

See also:

- Launching Signature Utilities (page 1)
- Setting Up Signature Utilities (page 2)

Launching Signature Utilities

1. Select *Start > All Programs > Signature.*
2. Right-click on **Signature Utilities** and select *Run as administrator.*
3. In the Welcome to Signature Utilities window, select a server.
4. Enter the user ID with the sysAdmin role in SQL.
5. Enter the password.
6. Select *OK*.
7. Select a company.
8. Select *OK*.

Setting Up Signature Utilities

Setting Up the Import Utility

Before importing data files into Service Management and Job Cost, you must specify their location.

1. Select *Signature Utilities > Setup > Import Setup*.
2. Select the folder button in the Delimited Files Location field to select the path to the import files' location.
3. In the File Format field, select **Comma** or **Tab** from the drop-down list. Comma-delimited files end in .CSV and tab-delimited files end in .TXT.
4. Select a format from the Date Format drop-down list.
5. Select *Save*.

Viewing the Import Journal

The Import Journal window shows the date the files were last updated and the user ID of the person who performed the import.

Select *Signature Utilities > Setup > Import Journal*.

Viewing the System Report

The System Information report lists the contents of the DYNAMICS.SET file and other system information.

Select *Signature Utilities > Setup > System Information*. Complete the Report Destination screen.

Signature Import Utility

This section describes the steps for importing files into Service Management Series and Job Cost.

Signature Utilities validates imported data, which means if a record does not have data in the validated fields, the record is not imported.

In addition, when you import customer or location data files into Service Management, both Service Management and Microsoft Dynamics GP tables are updated. If you import data using the Microsoft Dynamics GP Import Utility, only Microsoft Dynamics GP tables are updated. For more information on import field definitions, see Field Definitions (page 17).

Updated Job Cost change order rules have been implemented in Signature 2016 R3.

See also:

- Preparing to Import Files (page 3)
- Creating the Import File (page 3)
- Update to Change Order Rules (page 4)
- Using the Import Utility (page 5)

Preparing to Import Files

We recommend using comma-delimited (.CSV) files which can be created from Excel spreadsheet files.

Import File Guidelines

- Files to be imported should be located on the same drive on which the import is being done.
- Make sure you have data in all validated fields. See Field Definitions (page 17). Validated fields are marked with an asterisk.
- Fields must follow exact order by field position. See Field Definitions (page 17) for file layouts. If no value is needed, use commas or tabs for the exact number of fields required.
  Example: **AARONFIT0001,PRIMARY,,,,,,,,,,** (Excel adds the additional commas for blank cells when the file is saved as ".CSV.")
- If a field contains a comma, the entire field must be surrounded by quotation marks or separated by tabs. For example, **XYZ Company, Inc.** must be entered as: **,"XYZ Company, Inc.",,,** or it will be interpreted as two fields. The use of a tab-delimited file will also avoid this error.
- Fields should only be padded with spaces at the end or right side.
- Currency fields must be in the following format: **000.00 or +0000001000.00** Don't use commas or currency symbols. Use two decimal digits. Signs (- or +) must be leading, if used.
- Date fields must be in any of the following formats:

MM/DD/YYYY	07/06/1999 or 7/6/1999
MM/DD/YY	07/06/99 or 7/6/99
DD/MM/YYYY	30/03/1999 or 30/3/1999
DD/MM/YY	30/03/99 or 30/3/99

  Date fields must match the setting in *Setup* > *Import Setup*.

- Time fields must be in military format. For example, use **153000** to designate 15 hours, 30 minutes, 0 seconds or 3:30 p.m. Use: HourMinuteSecond A blank time field will result in 12:00 a.m.
- Check Box fields must be in the following format: **0 = false (unmarked)** or **1 = true (marked)**
- Boolean fields must be in the following format: **0 = false** or **1 = true**
- Phone numbers should be in the following format: **41482141000000** List the area code, 7 digit phone number, and 4 digit extension. Don't use dashes or parentheses.
- Integers must be in the following format: **550 (= 5.50) or 500 (= 5.00)** Don't use decimal points.
- Percentages must be in the following format: **0.065 (= 6.5%) or 0.1 (= 10%)**

Creating the Import File

You create an import file using a text editor (such as WordPad) or Excel. We recommend using comma-delimited (.CSV) files which can be created with Excel spreadsheet files.

Information to Include in the Import File

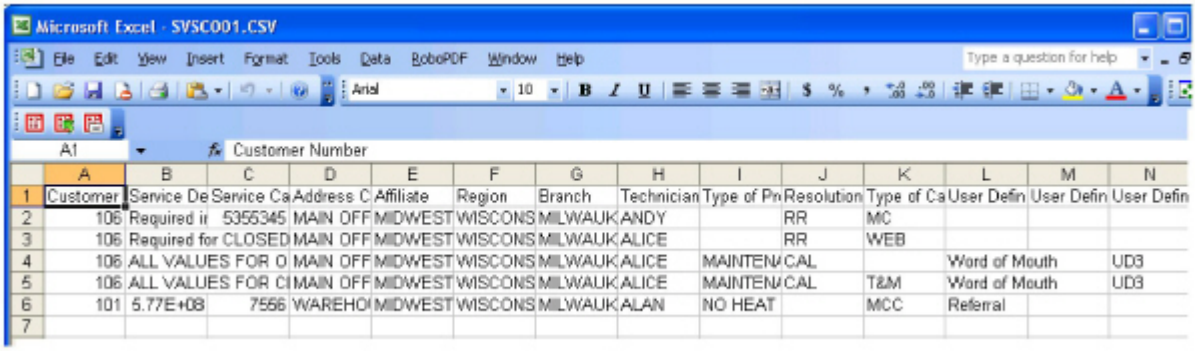
Each row (in a text file) or each column (in an Excel file) corresponds to a field within Service Management. You need to know the individual field definitions and storage type definitions for each field in Service Management files related to service calls. See Service Call Master File (page 19) for information on these fields.

Import File Guidelines

See Import file guidelines (page 3) for information on import file guidelines.

Sample Import File

Below is a sample import file that was created as a spreadsheet. The first row of the import file is reserved for header information and is not imported.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Customer	Service De	Service Ca	Address C	Affiliate	Region	Branch	Technician	Type of Pr	Resolution	Type of Ca	User Defin	User Defin	User Defin
2	106	Required ir	5355345	MAIN OFF	MIDWEST	WISCONS	MILWAUK	ANDY		RR	MC			
3	106	Required for	CLOSED	MAIN OFF	MIDWEST	WISCONS	MILWAUK	ALICE		RR	WEB			
4	106	ALL VALUES FOR O		MAIN OFF	MIDWEST	WISCONS	MILWAUK	ALICE	MAINTENA	CAL		Word of Mouth		UD3
5	106	ALL VALUES FOR CI		MAIN OFF	MIDWEST	WISCONS	MILWAUK	ALICE	MAINTENA	CAL	T&M	Word of Mouth		UD3
6	101	5.77E+08	7556	WAREHOI	MIDWEST	WISCONS	MILWAUK	ALAN	NO HEAT		MCC	Referral		
7														

Name and Location of the Import File

- The name of the import file must correspond to the type of data being imported. See File Maintenance Utilities (page 8) for a list of names.
- The file must be placed in the location that was set up in the Import Setup Options window. See Setting up the import utility (page 2) for more information.

Update to Change Order Rules

If you are using the RPO revenue recognition method, the updated change order rules were implemented in the Signature 2016 R3 release. The change orders that can be created are limited based on the job's contract type:

Job Type	Change Order Type
Fixed	Fixed, Cost Plus

Job Type	Change Order Type
Cost Plus	N/A - None
Cost Plus NTE	Cost Plus NTE*

**By design, a Cost Plus NTE change order increases the overall NTE amount for the job. It is not tracked as a separate NTE change order.*

Using the Import Utility

The file import process involves the following:

- Loading all records from the import (delimited) file to the warehouse file
- Validating the records against the appropriate files
- Committing the valid records to the destination file(s)

To use the Import Utility:

1. Select *Signature Utilities > Import Utility*.
2. Select *Job Cost* or *Service Management*.
3. Select a file to import data to. See Field definitions (page 17) for import field definitions. The Import window opens. The lower scrolling window displays the existing records in the file you are importing to.
    a. When importing a large amount of data, you may want to place the import files and client on the server for faster importing.
    b. When importing the Customer Master File, address codes referenced in the customer records must also exist or be imported in the Location Master File
4. Select the *Import* button to import the delimited file. Respond *Yes* to the message asking if you want to continue. The delimited file is imported to a warehouse file where the validation takes place. The contents of the warehouse file display in the upper scrolling window of the Import window.
5. Select whether to show valid records, invalid records, or both in the upper scrolling window by marking or unmarking the *Show Valid Records* and *Show Invalid Records* checkboxes.
6. Select the show/hide detail button to view the status and description. Valid records have a status of Add or Update. Invalid records have a status of Missing, Duplicate, or Invalid.
   Although only three fields from the warehouse file display in the upper scrolling window, all required fields are validated, updated, or rejected during the import process.
7. Select *Commit* to commit the records. Records with a status of Change or Add will be moved from the warehouse file to the corresponding Signature and Microsoft Dynamics GP tables. Rejected records will not be added to the master file. If you are importing Customer, Equipment, or Contract records, you will receive a message asking if you want to update the appropriate quicksearch file. If you have a large quicksearch file, you may want to select *No* and update it later to save time. If you select *No*, you must delete the contents of the quicksearch file and run the update after you finish importing *(Signature Utilities > File Maintenance Utilities > Service Management > Customer Update)*.
8. You will receive a message stating how many new records will be added. Respond *Yes* to the question "Do you want to copy the records?"
9. Print the report by choosing the printer button in the Import window. Review the report.

See also:

- Importing Service Call Information into Service Management (page 6)
- After Importing Job Cost Files (page 7)

- Troubleshooting the Import Utility (page 7)

Importing Service Call Information into Service Management

You can use a utility to import service call information into Service Management. Since service calls require at least one appointment, this utility creates default appointments for all imported service calls. At this time, you cannot import cost or billing information.

Before Importing

Every service call created in Service Management contains an ID that uniquely identifies that service call. When you create a service call, you can enter a service call ID manually, or have the system generate it automatically.

Before importing service calls, answer the following question:

How is your Signature system set up to create service calls?

If the system is set up to auto-generate service calls, you *do not* need to include service call ID's in your import file. If the system is set up so that users need to enter a service call ID each time a new service call is created, then you must include service call ID's in your import file.

This choice was determined when your system was set up initially. When you create your import file, you need to know how this was set up so that you can determine whether you need to include the service call ID in your import file. Select *Microsoft Dynamics GP > Tools > Setup > Signature Service > Module Setup > Service Call ID*.

> ⚠ If the system is set up to auto-generate service calls, and you do happen to include service call IDs in your import file, then during the import process, the system will store that service call ID you entered in the Service User Defined 1 field in the Service Call window. This allows you to reference these service call IDs later, if necessary.

Importing Service Call Information

1. Select *Signature Utilities > Import Utility > Service Management*.
2. Select *Service Call MSTR*. The Service Call Import window opens.
3. Refer to Using the import utility (page 5) for step-by-step instructions on completing this window and finishing the import process.

After Importing

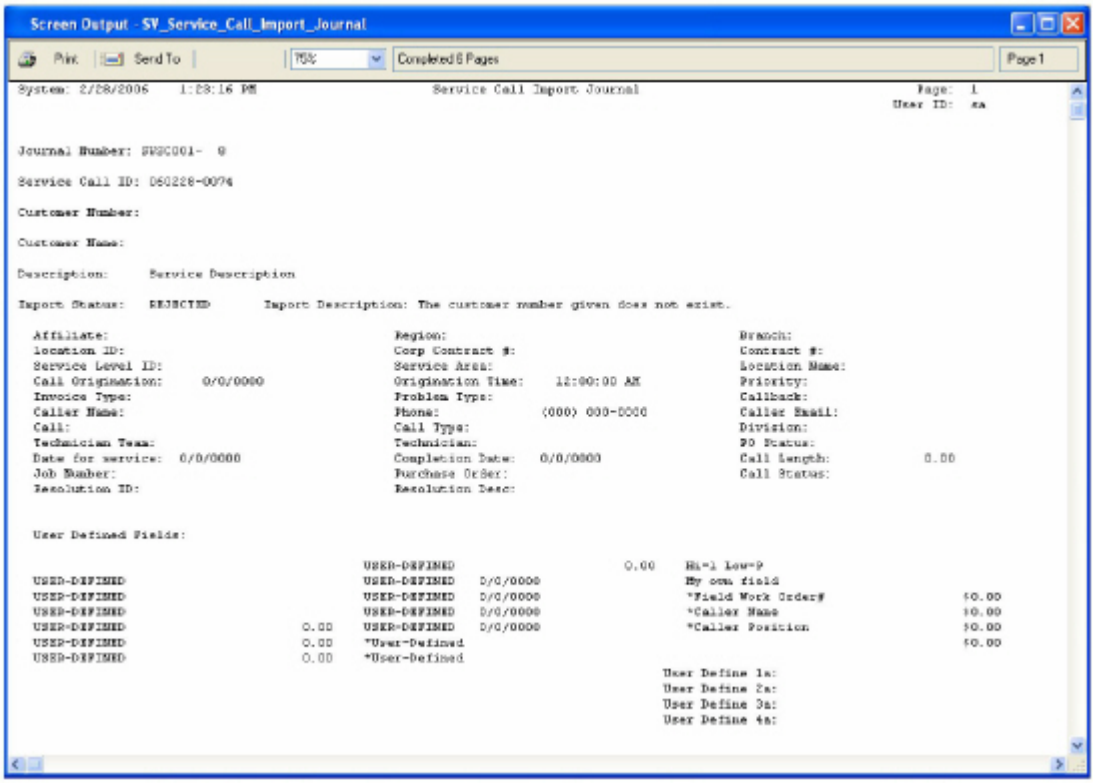
After importing service calls, the system does the following:

- Creates a default appointment for each newly imported service call, and a new record in appointment history (if the appointment history option is enabled)
- Creates a new record in the service call history log
- Creates a Service Call Import Journal (see below)

Service Call Import Journal

This report provides a list of all service call import records, including those that were imported successfully and those that were not imported. For rejected service call records, the report provides the reason for the rejection.

A sample report appears below:



After Importing Job Cost Files

After importing Job Cost files, run the following utilities in Job Cost:

>If you imported this	Run this utility	Navigation path
Bill Codes	Reconcile Bill Codes	*Tools > Utilities > Job Cost > Reconcile Bill Codes*
Subcontractors	Reconcile Subcontractors	*Tools > Utilities > Job Cost > Reconcile Subcontractors*

For more information on these utilities, refer to the *Job Cost User Manual*.

Troubleshooting the Import Utility

- **Date fields are not importing correctly**
  If the imported file used a date format containing slashes such as 02/15/15, check the source data. The record must be typed: '02/15/15. The single quote identifies the numbers as a date with slashes.
- **The phone button in the customer window doesn't work**
  Most likely, phone numbers were imported without the four-digit extension. Therefore, Service Management

cannot find a matching record. Select *Signature Utilities > File Maintenance Utilities > Service Management > Phone Extensions.* Run the utility to set all phone and fax number extensions to 0000.

- **Service Management maintenance contract records are not importing correctly**
  When Premier users import maintenance contract records, the escalation date is required. Ensure the field location contains the anniversary date.

File Maintenance Utilities

This section describes the maintenance processes performed by Signature Utilities to keep Service Management and Job Cost files working smoothly.

> ⚠ Always back up your data files before performing any file maintenance procedure.

See also:

- Job Cost File Maintenance Utilities (page 8)
- Service Management File Maintenance Utilities (page 10)
- Signature File Maintenance Utilities (page 15)

Job Cost File Maintenance Utilities

- Purge Utility (page 8)
- Remove Job History Utility (page 9)
- Clear Data Utility in Job Cost (page 9)
- Date Validation Utility (page 9)
- Update Division Accounts Utility (page 9)
- Enable Payroll Utility (page 10)
- APOP to POP Migration Utility (page 10)

Purge Utility

The Purge utility deletes non-job related detail from the Job Transaction Open file. The Purge utility decreases the time required to print reports that use both sorting options and the Job Transaction Open file.

> ⚠ Back up your data before purging the files. Make sure no one is logged in to Microsoft Dynamics GP when you purge Job Cost data files. If other users are logged in, an alert message appears, and the purge process will not run to completion.

1. Select *Signature Utilities > File Maintenance Utilities > Job Cost > Purge*.
2. A message appears asking if you want to proceed. Select *Proceed*.

Remove Job History Utility

Job transaction records provide useful information for analysis and audit purposes. When you close a job, transaction files automatically become part of the Job Cost historical records and remain part of your accounting records until you run the Remove Job History utility.

> ⚠ Back up your Job Cost data files before removing history.

1. Select *Signature Utilities* > *File Maintenance Utilities* > *Job Cost* > *Remove Job History*.
2. All closed jobs appear in the scrolling window.
   a. To remove an individual job, mark the checkbox in the Status column. The status changes from Available to Marked.
   b. To mark all history jobs for removing, select *Mark All*. Select *Unmark All* to unmark all marked jobs in the scrolling window.
   c. To view only the marked jobs, select the *Marked* radio button.
3. Select *Print* to print the Remove Job History report. This report contains job numbers to be removed, the job manager, and the job contract number.
4. Select *Remove* to remove job history for the jobs displayed in the scrolling window.

Clear Data Utility in Job Cost

If your data becomes severely damaged, you can clear it from the tables and then re-enter the data. Clearing data deletes the data from a table and should only be done as a last resort.

> ⚠ Back up the entire folder containing the tables to be cleared before performing this utility.

To clear data:

1. Select *Signature Utilities* > *File Maintenance Utilities* > *Job Cost* > *Clear Data*.
2. Select a table to clear in the Tables scrolling window and select *Insert*>> to insert it in the Selected Tables scrolling window. Repeat this procedure for each table you want to clear. If you want to select all table for clearing, select *All* >>.
3. Select *Clear Data*. All selected tables will be cleared.

Date Validation Utility

This utility validates the posting dates of your Job Cost data. The utility only changes the GL posting date recorded on job transactions if the date is different from the one on the GL posting.

> ⚠ Back up the entire folder containing the files to be cleared before performing this utility.

1. Select *Signature Utilities* > *File Maintenance Utilities* > *Job Cost* > *Date Validation*.
2. A message appears asking if you want to proceed. Select *Proceed*.

Update Division Accounts Utility

This utility updates the general ledger posting account for all cost codes in a division when the division account has been changed in the Division Accounts Setup window. If you're using the Division posting option, the utility validates

that all cost codes have the correct division account. This is useful if you imported jobs and cost codes or migrated from another system.

1. Select *Signature Utilities > File Maintenance Utilities > Job Cost > Update Division Accts*.
2. A message appears asking if you want to proceed. Select *Proceed*.

Enable Payroll Utility

This utility grants access to Microsoft Dynamics GP payroll forms that are used in Signature products.

1. Select *Signature Utilities > File Maintenance Utilities > Job Cost* > Enable Payroll.
2. A message appears asking if you want to proceed. Select *Proceed*.

APOP to POP Migration Utility

If you enter/match an invoice in Microsoft Dynamics GP Purchase Order Processing (POP) *(Transactions > Purchasing > Enter/Match Invoices)* for a shipment that was posted before migrating from Intellisol Advanced Purchase Order Processing (APOP) to POP, the shipment costs might be posted twice in Job Cost. The APOP to POP Migration utility removes duplicate posted transactions.

Step 1: Run the APOP to POP Migration Utility

1. Select *Signature Utilities > File Maintenance Utilities > Job Cost > APOP to POP Migration*.
2. A message appears asking if you want to proceed. Select *Proceed*. A report appears listing the duplicate posted transactions that were removed.

Step 2: Run the Reconcile Jobs Utility

You must run the Reconcile Jobs utility for each job that contains duplicate posted transactions.

1. Select *Microsoft Dynamics GP > Tools > Utilities > Signature Job Cost > Reconcile Jobs*.
2. Mark the appropriate checkboxes, and select *All* for the range. To save time, you can unmark the Validate Job Transactions and Print Audit Report checkboxes.
3. Select *Reconcile*.

Service Management File Maintenance Utilities

- Clear Contract Tasks Utility (page 11)
- Tax Schedule Fill Utility (page 11)
- Check Links Utility (page 11)
- Verify File Contents Utility (page 12)
- Customer Update Utility (page 12)
- Equipment Update Utility (page 12)
- Contract Update Utility (page 13)
- Service Locations Utility (page 13)
- Phone Extensions Utility (page 13)
- Merge Customer Locations Utility (page 13)
- Service Sublocations Utility (page 14)
- Rounding Problem Utility (page 14)
- Clear Data Utility in Service Management (page 15)

- Task Update Utility (page 15)

Clear Contract Tasks Utility

If you delete an MCC service call and need to re-create it, run this utility to clear the contract tasks so the service call can be re-created.

1. Select *Signature Utilities > File Maintenance Utilities > Service Management > Clear Contract Tasks*.
2. Select to run the utility for all customers or for an individual customer.
3. Use the drop-down lists to select a month and year in which to clear the tasks.
4. If you are running the utility for an individual customer, complete the remaining fields. Use the lookups in the Customer ID, Location, and Contract Number fields to make your selections.
5. Select *OK* to run the utility.

Tax Schedule Fill Utility

This utility updates all service records that have empty tax schedule IDs.

1. Select *Signature Utilities > File Maintenance Utilities > Service Management > Tax Schedule Fill*.
2. Enter the tax schedule ID to add to all locations with empty tax schedule IDs. The tax schedule ID must already be set up in Microsoft Dynamics GP.
3. Select *Fill*.

Check Links Utility

This utility checks the links between certain tables. If information in one table is missing or damaged, this process examines other tables where the same information is stored. If a missing or damaged record is found, the remaining data or records will be deleted so you can manually re-enter the damaged data.

> ⚠ Back up the entire folder containing the tables to be checked before performing this process.

1. Select *Signature Utilities > File Maintenance Utilities > Service Management > Check Links*.
2. Select the table you want to check in the Tables scrolling window and select *Insert >>* to insert it in the Selected Tables scrolling window.
   The following tables are checked:

Table	Check links with:
SV_Contract_Billing_MSTR	SV_Maint_MSTR
SV_Customer_MSTR	RM_Customer_MSTR
SV_Equipment_MSTR	SV_Location_MSTR
SV_Location_MSTR	SV_Customer_MSTR

Table	Check links with:
SV_Maint_Annual_MSTR	SV_Customer_MSTR SV_Location_MSTR SV_Equipment_MSTR
SV_Maint_MSTR	SV_Location_MSTR
SV_Service_MSTR	SV_Customer_MSTR

3. Select *Preview* to view the missing or damaged records. An error log report prints.
4. Select the *Check Links* button to begin the process. You will receive a message asking if you want to continue. Select *Continue*.
5. You will receive a message when the Check Links utility is complete. Select *OK*.

> ⚠ Service Management also has a Check Links process that checks specific links. See the *Utilities section in* the *Service Management User Manual* for more information.

Verify File Contents Utility

This utility verifies that your data tables contain valid data. Data can become damaged after a hardware failure or as you increase your database size or install software upgrades.

1. Select *Signature Utilities > File Maintenance Utilities > Service Management > Verify File Contents*.
2. Select a table in the Tables scrolling window and select *Insert >>* to insert it in the Selected Tables scrolling window. Repeat this procedure for each table you want to verify. Select *All >>* if you want to insert all tables.
3. Select *Verify* to begin the process.
4. You will receive a message when the tables are verified. Select *OK*.
5. If any tables are reported as invalid, an error report will be generated listing individual damaged records. Call WennSoft Support if you need assistance to repair damaged records.

Customer Update Utility

This utility updates your customer database information. As you install Service Management software upgrades or increase the size of your customer database files, you should run the customer update utility. This utility deletes the old customer quicksearch file and creates a new one. This file contains key fields from the Microsoft Dynamics GP customer and customer address files as well as the Service Management customer and location files.

Select *Signature Utilities > File Maintenance Utilities > Service Management > Customer Update*.

Equipment Update Utility

The Equipment Update utility updates your equipment database. As you install Service Management software upgrades or increase the size of your customer database files, you should run the equipment update utility. This utility deletes the old equipment quicksearch file and creates a new one. This file contains key fields from the Service Management equipment file.

Select *Signature Utilities > File Maintenance Utilities > Service Management > Equipment Update*.

Contract Update Utility

The Contract Update utility updates your contract database. As you increase your database size or install software upgrades, you should run the contract update utility. This utility archives all canceled and closed contracts, then deletes them from the contract history and contract quicksearch tables. The quicksearch file is deleted and replaced with a new quicksearch file that contains key fields from the Service Management contract file.

> ⚠ If you would like the closed contracts to be populated in the quicksearch file after running this utility, you must contact Signature Consulting Services to have this done for you.

Select *Signature Utilities > File Maintenance Utilities > Service Management > Contract Update*.

Service Locations Utility

The Service Locations utility creates Service Management location records for locations previously entered through Microsoft Dynamics GP. Existing Service Management location records are not modified. After running the Service Locations utility, you should run the Customer Update utility to update your customer database information.

1. Select *Signature Utilities > File Maintenance Utilities > Service Management > Service Locations*.
2. Enter the location name, labor rate group, and price matrix. The utility validates these fields.
3. Select *Save.*
4. A message appears asking if you want to continue. Select *Yes*. The SV_Location_MSTR file will be updated.
5. Run the Customer Update utility by choosing *Signature Utilities > File Maintenance Utilities > Service Management > Customer Update*.

Phone Extensions Utility

If phone numbers were imported into Service Management without extensions or without entering zeroes for the extension, the phone button in the Service Manager window will not work. This utility changes all empty extensions for phone numbers and fax numbers to 0000.

1. Select *Signature Utilities > File Maintenance Utilities > Service Management > Phone Extensions*.
2. A message appears asking if you want to proceed. Select *Proceed*.

Merge Customer Locations Utility

If you have multiple locations for a customer, you can use this utility to merge all records associated with those locations into a single location. The merge process reassigns all equipment, tasks, contracts, service calls, and subsidiary records from one customer location to another location.

For example, a customer has the following multiple location records:

- Location 1 (primary) Contract 100
- Location 2 (warehouse) Contract 200

When you merge Location 2 and the subsidiary Contract 200 record into Location 1, both Contract 100 and Contract 200 will be stored with the Location 1 record. If you need to delete Location 2, you can do this from the Location window as this validates the address is not in use and will warn you if it cannot be deleted.

If a duplicate record is found at the primary location, the process will be suspended and you can modify or delete the affected records.

IMPORTANT

- The Bill to Customer/Bill to Address information for any records that reference the Service Location to be merged will not be updated. Please evaluate all instances where this Service Location is used as a Bill to Address for any open Service Call, Service Invoice, Master Contract, and/or Maintenance Contract.
- This feature is NOT compatible with Equipment Management and will not update the link between the EMS Equipment and the Signature Customer and Location. Any links for Equipment for the service location that has been merged will need to be updated to ensure ongoing scheduled maintenance can be properly generated.

To merge customer locations:

1. Select *Signature Utilities > File Maintenance Utilities > Service Management > Merge Cust. Locations*.
2. Enter the customer ID and associated address ID that will be merged to a different location. The originating address ID cannot be the primary address. Any task, equipment, contract, or service call records associated with this address ID will be moved to the new location.
3. Enter the new location where the merged file will be located.
4. Select *Merge*. If records could not be merged, those records and associated alert messages will print on the Merge Location Error Log.
5. To merge files from a second location to this location, you must complete this procedure again.

Service Sublocations Utility

Users who previously had not used the sublocation feature can use this utility to first capture the data in the Equipment is Located field of the Equipment window. The captured data is placed into the validated Sublocation ID field of the Equipment window.

1. Select *Signature Utilities > File Maintenance Utilities > Service Management > Service Sublocations*.
2. A message appears asking if you want to proceed. Select *Proceed*.

Rounding Problem Utility

The Rounding Problem utility resolves a rounding issue between Service Management and Microsoft Dynamics GP that existed in versions 3.15b03 and earlier. On occasion, a service invoice would post to the RM Open file with a fraction of one cent. When this happened, payments were not fully applied. Therefore, paid transaction removal would fail, leaving these transactions in the RM Open File rather than the RM_History table. Microsoft Dynamics GP would not clear out these transactions because it did not see them as fully applied. This utility clears any fraction of pennies from the Current Trx Amount and Original Trx Amount fields in the RM Open file. Then the transaction is considered to be fully applied and can be moved to the RM_History table.

1. Select *Signature Utilities > File Maintenance Utilities > Service Management > Rounding Problem*.
2. Select *Preview* to view the transactions that will be affected.
3. Select *Proceed* to run the utility.

Clear Data Utility in Service Management

If your data becomes severely damaged, you can clear it from the tables and then re-enter the data. Clearing data erases the data from a table and should only be done as a last resort. You should be well-acquainted with the table structure and table dependencies of Service Management before attempting this procedure.

> ⚠ Back up the entire folder containing the tables to be cleared before performing this utility.

1. Select *Signature Utilities > File Maintenance Utilities > Service Management > Clear Data*.
2. Select the table you want to clear in the Tables scrolling window and select *Insert >>* to insert it in the Selected Tables scrolling window. Repeat this procedure for each table you want to clear. You can also select *All>>* if you want to clear all Service Management data.
3. Select *Clear Data*. A message appears asking if you're sure you want to clear the data.
4. Select *Yes* to clear all selected tables. You must re-enter all cleared information to restore the tables.

Task Update Utility

Task schedules of 0, 98, and 99 are not supported in Signature version 7.5 and later. Users upgrading from versions before 7.5 should run the Task Update utility to replace these schedules. The utility replaces all task schedules of 0, 98, or 99 with a task schedule of 13 and a frequency of Monthly.

1. Select *Signature Utilities > File Maintenance Utilities > Service Management > Task Update*.
2. Select *Yes* to the message asking if you want to continue.

Signature File Maintenance Utilities

- SQL Update Utility (page 15)
- SQL Table Verify Utility (page 15)
- SQL Update Misc User Utility (page 16)
- SQL Create Table Views (page 16)
- SQL Auto Call Roll Forward Utility (page 16)

SQL Update Utility

The SQL Update Utility updates SQL objects and error message tables.

1. Select *Signature Utilities > File Maintenance Utilities > Signature > SQL Update*.
2. You will receive a message instructing you to back up your database and close other applications. Select *Continue*.
3. In the Install Company window, select companies to install and select *Begin Process*.

SQL Table Verify Utility

The SQL Table Verify Utility is password-protected and is for WennSoft use only.

SQL Update Misc User Utility

The SQL Update Misc User Utility creates a miscellaneous user on each database (including Dynamics), which enables actual users to use the following the Graphical Dispatch Board and Document Attachments. This user is used by the system only, and contains no associated login.

> ⚠ If, at any point, you create an additional company for your system, you must re-run this utility after creating the company.

1. Select *Signature Utilities > File Maintenance Utilities > Signature > SQL Update Misc User*.
2. Select *Yes* to the Update the SQL Misc User prompt.

SQL Create Table Views

The SQL create table views user utility brings data from multiple tables together to create a dataset(s) to view this information.

1. Select *Signature Utilities > File Maintenance Utilities > Signature Utilities > SQL Create Table Views*.
2. Select *Yes* to the SQL Create Table Views prompt.

SQL Auto Call Roll Forward Utility

This 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). See Auto-Roll Calls Forward in Choosing Service Options[1] for additional information. The SQL Job evaluates the number of Dynamics companies for which Signature Service Management is installed. For those companies, the Create SQL Job process will create the Auto-Call Roll Forward SQL job which can then be configured and scheduled, as needed.

1. Select *Signature Utilities > File Maintenance Utilities > Signature Utilities > SQL Auto Call Roll Forward*.
2. In the SQL Auto Call Roll Forward window, select *Create SQL Job*.
3.
   - If the SQL Server Agent is running, the following message displays "SQL Job "Signature Auto-Roll Calls Forward" was created. This job has a separate step for each company database. Each step (each company) will run the procedure SMS_Auto_Call_Roll_Forward if the company's setup option is set to on. (Auto Roll Calls Forward and the Use Auto-Roll SQL Job options must both be marked in Setup Options.)
   - If the SQL Server Agent is not running, the following message displays: "SQLServerAgent is not currently running so it cannot be notified of this action." This indicates that the job was not created.

> ⚠ If you create any additional companies after running this utility, and mark the two Auto Roll options in Setup Options, you can run the utility again by coming back to the window and selecting *Update SQL Job*. This will not affect the previously-created SQL job other than to add a new step. Additionally, if you want to stop the SQL Auto Call Roll Forward Job, you can unmark the Use Auto-Roll SQL Job option in Setup Options. *Microsoft Dynamics GP > Tools > Setup > Service Management > Module Setup > Service Options*.

1. https://wennsoft.atlassian.net/wiki/spaces/sig2026/pages/1620324419/Choosing+Service+Options

Field Definitions

When importing data, you must know the individual field descriptors and storage type definitions for each field in the Service Management and Job Cost files.

- Warehouse File Names (page 17)
- Service Management Field Definitions (page 18)
- Job Cost Field Definitions (page 63)

Warehouse File Names

The following tables list the warehouse file names and the operating system code names.

Service Management File Names		
Master File Category	**Warehouse File Name**	**Physical Name**
Customer master file	SV_Customer_IMP_WHSE	SV02100
Location master file	SV_Location_IMP_WHSE	SV02200
Receivables sum master file	SV_RM_Customer_SUM_IMP_WHSE	SV02103
Equipment master file	SV_Equipment_MSTR_IMP_WHSE	SV02400
Contract master file	SV_Maint_MSTR_IMP_WHSE	SV02500
Contract task master file	SV_Contract_Task_MSTR_IMP_WHSE	SV02530
Job costs master file	SV_Job_Costs_IMP_WHSE	SV02810
Employee master file	SV_Employee_IMP_WHSE	SV02110
Service master file	SV_Service_MSTR_IMP_WHSE	SV02030
Job Cost File Names		
Master File Category	**Warehouse File Name**	**Physical Name**

Job Cost File Names		
Job master file	JC_Job_MSTR_IMP_WHSE	JC200102
Job detail master file	JC_Job_Detail_MSTR_IMP_WHSE	JC200701
Billing codes master file	JC_Billing_Codes_MSTR_IMP_WHSE	JC200601
Change order master file	JC_Change_Orders_MSTR_IMP_WHSE	JC201001
Change order detail master file	JC_Chg_Ord_Detail_MSTR_IMP_WHSE	JC201002
Vendor master file	JC_Vendor_MSTR_IMP_WHSE	JC201501
Cost codes master file	JC_Cost_Codes_MSTR_SETP_IMP_WHSE	JC240202
Miscellaneous File Names		
Master File Category	**File Name**	**Physical Name**
Journal/History	SV_Import_Journal_MSTR	SV02010
Setup Options	SV_Import_Setup_Options	SV02020
Users	Users	WSUSERS

Service Management Field Definitions

- Service Call Master File (page 19)
- Customer Master File (page 23)
- Location Master File (page 27)
- Receivables Sum Master File (page 30)
- Equipment Master File (page 35)
- Contract Master File (page 41)
- Contract Task Master File (page 48)
- Job Costs Master File (page 53)
- Employee Master File (page 57)

Service Call Master File

Import File: **SVSC001.CSV (Comma) or SVSC001.TXT (Tab)**
Warehouse File: **SV_Service_MST_IMP_WHSE**
Destination Files: **SV_Service_MSTR (SV00300)**

*Indicates validated fields, and must contain data.

**Indicates validated fields, but can be left empty.

***Indicates required (and validated) if using Global Filtering.

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
1	A	*Customer Number	String	15	15
2	B	*Service Call Description	String	30	31
3	C	*Service Call ID (required only if system is set up to manually create service call Id's)	String	17	17
4	D	*Address Code	String	15	15
5	E	***Signature Affiliate	String	15	15
6	F	***Signature Region	String	15	15
7	G	***Signature Branch	String	15	15
8	H	Technician	String	10	11
9	I	Type of Problem	String	30	31
10	J	**Resolution ID	String	3	3
11	K	**Type Call Short **Note:** If call type is MC or MCC, Contract Number is required.	String	3	3

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
12	L	User Define 1a	String	30	31
13	M	**User Define 2a **Note:** Will be validated if the corresponding checkbox is marked in Service Options window,	String	30	31
14	N	User Define 3a	String	30	31
15	O	User Define 4a	String	30	31
16	P	*Purchase Order (required only if location requires a PO number)	String	15	15
17	Q	*Date of Service Call	Date	8	8
18	R	**Salesperson ID	String	15	15
19	S	Priority of Call	String	1	1
20	T	Status of Call	String	10	11
21	U	Completion Date **Note:** If Status of Call is complete, Completion Date is required.	Date	8	8
22	V	*WS Time 1	Date	8	8
23	W	Time Zone	String	3	3
24	X	DATE	Date	8	8
25	Y	*Divisions	String	15	15

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
26	Z	Call Time	Integer	4	4
27	AA	Corporate Contract Number	String	20	21
28	AB	**Contract Number	String	10	11
29	AC	Caller Email Address	String	40	41
30	AD	Caller Name	String	30	31
31	AE	Caller Phone	String	20	21
32	AF	Callback	Tiny Integer	1	1
33	AG	WS Job Number	String	17	17
34	AH	**SV Service Level ID	String	10	11
35	AI	PO Outstanding Status	String		15
36	AJ	Service User Define 2	String	20	21
37	AK	Service User Define 3	String	30	31
38	AL	Service User Define 4	String	30	31
39	AM	Service User Define 5	Integer	6	4
40	AN	Service User Define 6	Integer	6	4
41	AO	Service User Define 7	Integer	6	4

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
42	AP	Service User Define 8	Integer	6	4
43	AQ	Service User Define 9	Date	8	8
44	AR	Service User Define 10	Date	8	8
45	AS	Service User Define 11	Date	8	8
46	AT	Service User Define 12	Date	8	8
47	AU	Service User Define 18	Tiny Integer	1	1
48	AV	Service User Define 19	Tiny Integer	1	1
49	AW	Service User Define 20	Tiny Integer	1	1
50	AX	Service User Define 21	Tiny Integer	1	1
51	AY	Service User Define 22	Numeric	14	9
52	AZ	Service User Define 23	Numeric	14	9
53	BA	Service User Define 24	Numeric	14	9
54	BB	Service User Define 25	Numeric	14	9
55	BC	Added Rate	Tiny Integer		

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
56	BD	WCA Originating Call	String	17	17
57	BE	WCA Technician	String	15	15
58	BF	SV Call Source	Integer	3	3
59	BG	SV Call Source ID1	String	40	40
60	BH	SV Call Source ID2	String	40	40

Customer Master File

Import File: **SVCU0001.CSV (Comma) or SVCU0001.TXT (Tab)**
Warehouse File: **SV_Customer_IMP_WHSE**
Destination Files: **RM_Customer_MSTR (RM00101), SV_Customer_MSTR (SV00100)**
Quicksearch File: **SV_Customer_Quicksearch (SV00054)**

*Indicates validated fields, and must contain data.

**Indicates validated fields, but can be left empty.

- 'Address Code' (8,H) and 'Primary Billto Address Code' (19,S) should have the same value.
- Your option for the 'PO Required' (47,AU) checkbox is populated when the Location Master file is imported.

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
1	A	*Customer Number	String	15	16
2	B	Customer Name	String	64	68
3	C	Customer Class	String	15	16
4	D	Corporate Customer Number	String	15	16
5	E	Contact Person	String	30	32
6	F	Statement Name	String	64	66

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
7	G	Short Name	String	15	16
8	H	*Address Code	String	15	16
9	I	Tax Schedule ID	String	15	16
10	J	Address 1	String	30	32
11	K	Address 2	String	30	32
12	L	Country	String	20	22
13	M	City	String	30	32
14	N	State	String	4	30
15	O	Zip	String	10	12
16	P	Phone 1	String	14	22
17	Q	Phone 2	String	14	22
18	R	Fax	String	14	22
19	S	*Primary Billto Address Code	String	15	16
20	T	Primary Shipto Address Code	String	15	16
21	U	Statement Address Code	String	15	16
22	V	Salesperson ID	String	15	16
23	W	Checkbook ID	String	15	16
24	X	Payment Terms ID	String	20	22

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
25	Y	Credit Limit Type	Radio Group	1	1
26	Z	Credit Limit Amount	Currency	17	10
27	AA	Credit Limit Period	Drop-Down List	1	1
28	AB	Credit Limit Period Amount	Currency	17	10
29	AC	Currency ID	String	15	16
30	AD	Customer Discount	Integer	5	2
31	AE	Price Level	String	15	16
32	AF	Tax Exempt 1	String	25	26
33	AG	Tax Exempt 2	String	25	26
34	AH	Tax Registration Number	String	25	26
35	AI	Balance Type	Radio Group	1	1
36	AJ	Statement Cycle	Drop-Down List 1 = No Statement 2 = Weekly 3 = Biweekly 4 = Semimonthly 5 = Monthly 6 = Bimonthly 7 = Quarterly	1	1
37	AK	Sales Territory	String	15	16
38	AL	Inactive	Check Box	1	1

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
39	AM	Hold	Check Box	1	1
40	AN	Note Index	Currency	14	10
41	AO	**Signature Affiliate	String	15	16
42	AP	**SignatureRegion	String	15	16
43	AQ	**SignatureBranch	String	15	16
44	AR	User ID	String	15	16
45	AS	Technician ID	String	15	16
46	AT	Technician Team	String	15	16
47	AU	PO Required	Check Box	1	1
48	AV	Contact Name	String	15	16
49	AW	User Define 1a	String	30	32
50	AX	User Define 2a	String	30	32
51	AY	User Define 3a	String	30	32
52	AZ	User Define 4a	String	30	32
53	BA	User Define 5a	String	30	32
54	BB	User Define 6a	String	30	32
55	BC	Time Zone	String	3	4
56	BD	SV Language ID	Integer	2	2
57	BE	Supervisors ID	String	15	16

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
58	BF	Hold Transaction ID	Long Integer	7	4

Location Master File

Import File: **SVCU0002.CSV (Comma) or SVCU0002.TXT (Tab)**
Warehouse File: **SV_Location_IMP_WHSE**
Destination Files: **RM_Customer_MSTR_ADDR (RM00102), SV_Location_MSTR (SV00200)**

*Indicates validated fields, and must contain data.

**Indicates validated fields, but can be left empty.

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
1	A	*Customer Number	String	15	16
2	B	*Address Code	String	15	16
3	C	Salesperson ID	String	15	16
4	D	UPS Zone	String	3	4
5	E	Shipping Method	String	15	16
6	F	Tax Schedule ID	String	15	16
7	G	Contact Person	String	30	32
8	H	Address 1	String	30	32
9	I	Address 2	String	30	32
10	J	Country	String	20	22
11	K	City	String	30	32
12	L	State	String	4	30
13	M	Zip	String	10	12

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
14	N	Phone 1	String	14	22
15	O	Phone 2	String	14	22
16	P	Fax	String	14	22
17	Q	**Signature Affiliate	String	15	16
18	R	**Signature Region	String	15	16
19	S	**Signature Branch	String	15	16
20	T	User ID	String	15	16
21	U	Technician ID	String	15	16
22	V	Technician Team	String	15	16
23	W	Customer Name	String	64	66
24	X	Map Grid	String	15	16
25	Y	Service Area	String	15	16
26	Z	*Location Name	String	30	32
27	AA	*Labor Group Name	String	15	16
28	AB	*Pricing Matrix Name	String	15	16
29	AC	Technician	String	10	12
30	AD	Technician 2	String	10	12
31	AE	Technician ID2	String	15	16

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
32	AF	Contact Name	String	15	16
33	AG	Hold Transaction ID	Long Integer	7	4
34	AH	User Define 1a	String	30	32
35	AI	User Define 2a	String	30	32
36	AJ	User Define 3a	String	30	32
37	AK	User Define 4a	String	30	32
38	AL	User Define 5a	String	30	32
39	AM	User Define 6a	String	30	32
40	AN	PO Required	Check Box	1	2
41	AO	Out of Service Flag	Check Box	1	2
42	AP	Alarm Flag	Check Box	1	2
43	AQ	Supervisors ID	String	15	16
44	AR	Supervisors Hold Flag	Check Box	1	2
45	AS	Corporate Customer Number	String	15	16
46	AT	Time Zone Tag	String	4	6
47	AU	SV Language ID	Integer	2	2
48	AV	Base Currency ID	String	15	16
49	AW	Billing Currency ID	String	15	16

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
50	AX	Local Currency ID	String	15	16
51	AY	Priority of Call	String	1	2
52	AZ	Divisions	String	15	16
53	BA	SV Service Level ID	String	10	12
54	BB	Safety Flag	Tiny Integer		
55	BC	Blanket PO Check Box	Tiny Integer		
56	BD	Blanket PO Number	String	17	17
57	BE	Blanket PO Amount	String		
58	BF	Blanket PO Amount Spent	Currency		
59	BG	Blanket PO Amount Remaining	Currency		
60	BH	Blanket PO Expiration Date	Date		
61	BI	*Bill Customer Number	String	15	16
62	BJ	*Bill Address Code	String	15	16

Receivables Sum Master File

Import File: **SVRM0001.CSV (Comma) or SVRM0001.TXT (Tab)**
Warehouse File: **SV_RM_Customer_SUM_IMP_WHSE**
Destination File: **RM_Customer_MSTR_SUM (RM00103)**

*Indicates validated fields, and must contain data.

**Indicates validated, but can be left empty.

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
1	A	Total Amount Of NSF Checks Life	Currency	19	10
2	B	Number Of NSF Checks Life	Long Integer	6	4
3	C	*Customer Number	String	15	16
4	D	Customer Balance	Currency	19	10
5 - 11	E-K	Aging Period Amounts	Currency	17	10
12	L	Last Aged	Date	6	4
13	M	First Invoice Date	Date	6	4
14	N	Last NSF Check Date	Date	6	4
15	O	Last Payment Amount	Currency	17	10
16	P	Last Payment Date	Date	6	4
17	Q	Last Transaction Date	Date	6	4
18	R	Last Transaction Amount	Currency	17	10
19	S	Last Finance Charge Amount	Currency	17	10
20	T	Unpaid Finance Charges YTD	Currency	17	10
21	U	Average Days to Pay - LYR	Integer	3	2

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
22	V	Average Days To Pay - Life	Integer	3	2
23	W	Average Days To Pay - Year	Integer	3	2
24	X	Number ADTP Documents - Life	Long Integer	10	4
25	Y	Number ADTP Documents - Year	Long Integer	10	4
26	Z	Total Discounts Taken YTD	Currency	19	10
27	AA	Total Discounts Taken LYR	Currency	19	10
28	AB	Total Discounts Taken LTD	Currency	19	10
29	AC	Total Discounts Available YTD	Currency	19	10
30	AD	Retainage	Currency	19	10
31	AE	Total Amount Of NSF Checks YTD	Currency	19	10
32	AF	Number Of NSF Checks YTD	Long Integer	6	4
33	AG	Unposted Sales Amount	Currency	19	10
34	AH	Unposted Cash Amount	Currency	19	10
35	AI	Unposted Other Sales Amount	Currency	19	10

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
36	AJ	Unposted Other Cash Amount	Currency	19	10
37	AK	Non Current Scheduled Payments	Currency	19	10
38	AL	Total Sales YTD	Currency	19	10
39	AM	Total Sales LTD	Currency	19	10
40	AN	Total Sales LYR	Currency	19	10
41	AO	Total Costs YTD	Currency	19	10
42	AP	Total Costs LTD	Currency	19	10
43	AQ	Total Costs LYR	Currency	19	10
44	AR	Total Cash Received YTD	Currency	19	10
45	AS	Total Cash Received LTD	Currency	19	10
46	AT	Total Cash Received LYR	Currency	19	10
47	AU	Total Finance Charges YTD	Currency	19	10
48	AV	Total Finance Charges LTD	Currency	19	10
49	AW	Total Finance Charges LYR	Currency	19	10
50	AX	Finance Charges CYTD	Currency	19	10

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
51	AY	Finance Charges LYR Calendar	Currency	19	10
52	AZ	Total Bad Debt YTD	Currency	19	10
53	BA	Total Bad Debt LYR	Currency	19	10
54	BB	Total Bad Debt LTD	Currency	19	10
55	BC	Total Waived FC YTD	Currency	19	10
56	BD	Total Waived FC LTD	Currency	19	10
57	BE	Total Waived FC LYR	Currency	19	10
58	BF	Total Writeoffs YTD	Currency	19	10
59	BG	Total Writeoffs LTD	Currency	19	10
60	BH	Total Writeoffs LYR	Currency	19	10
61	BI	Total # Invoices YTD	Long Integer	6	4
62	BJ	Total # Invoices LTD	Long Integer	6	4
63	BK	Total # Invoices LYR	Long Integer	6	4
64	BL	Total # FC YTD	Long Integer	6	4
65	BM	Total # FC LTD	Long Integer	6	4
66	BN	Total # FC LYR	Long Integer	6	4
67	BO	Write Offs LIFE	Currency	19	10
68	BP	Write Offs LYR	Currency	19	10

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
69	BQ	Write Offs YTD	Currency	19	10
70	BR	High Balance LYR	Currency	19	10
71	BS	High Balance YTD	Currency	19	10
72	BT	High Balance LTD	Currency	19	10
73	BU	Last Statement Date	Date	6	4
74	BV	Last Statement Amount	Currency	17	10
75	BW	Deposits Received	Currency	19	10
76	BX	On Order Amount	Currency	19	10

Equipment Master File

Import File: **SVEQ0001.CSV (Comma) or SVEQ0001.TXT (Tab)**
Warehouse File: **SV_Equipment_MSTR_IMP_WHSE**
Destination File: **SV_Equipment_MSTR(SV00400)**
Quicksearch File: **SV_Equipment_Quicksearch (SV00055)**

*Indicates validated fields, and must contain data.

*Indicates validated fields, but can be left empty.

If importing equipment groups, 'Wennsoft Master Equipment ID' (7,G) for all group items must be the same as the lead item's 'Equipment ID' (3,C). The lead item's 'Component Flag' (8,H) must be 0 and 'Wennsoft Master Equipment ID' (7,G) must be blank. The group items' 'Component Flag' (8,H) must be 1.

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
1	A	*Customer Number	String	15	16
2	B	*Address Code	String	15	16
3	C	*Equipment ID	String	30	30

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
4	D	User ID	String	15	16
5	E	Technician ID	String	15	16
6	F	Technician Team	String	15	16
7	G	Signature Master Equipment ID	String	15	16
8	H	Component Flag	Check Box	1	2
9	I	Component Qty	Integer	4	2
10	J	Corporate Customer Number	String	15	16
11	K	**Manufacturer ID	String	15	16
12	L	**Equipment Type	String	30	32
13	M	Signature Model Number	String	20	22
14	N	Signature Serial Number	String	40	42
15	O	Installed By Long Description	String	40	42
16	P	Extended Warranty Type	String	30	32
17	Q	Extended Warranty Expiration	Date	8	4
18	R	Warranty Expiration	Date	8	4
19	S	Install Date	Date	8	4

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
20	T	Location Equipment	String	50	52
21	U	Contract Number	String	10	12
22	V	User Define 1a	String	30	32
23	W	User Define 2a	String	30	32
24	X	User Define 3a	String	30	32
25	Y	User Define 4a	String	30	32
26	Z	User Define 5a	String	30	32
27	AA	User Define 9a	Date	8	4
28	AB	Start Up Date	Date	6	4
29	AC	Shutdown Month	Integer	2	2
30	AD	Startup Month	Integer	2	2
31	AE	Operating Hours Per Month	Integer	4	2
32	AF	Total Controls Per Unit	Integer	4	2
33	AG	Total Controls Qty	Integer	4	2
34	AH	Shutdown Jan	Integer	2	2
35	AI	Shutdown Feb	Integer	2	2
36	AJ	Shutdown Mar	Integer	2	2
37	AK	Shutdown Apr	Integer	2	2

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
38	AL	Shutdown May	Integer	2	2
39	AM	Shutdown Jun	Integer	2	2
40	AN	Shutdown Jul	Integer	2	2
41	AO	Shutdown Aug	Integer	2	2
42	AP	Shutdown Sep	Integer	2	2
43	AQ	Shutdown Oct	Integer	2	2
44	AR	Shutdown Nov	Integer	2	2
45	AS	Shutdown Dec	Integer	2	2
46	AT	Auto Date	Date	6	4
47	AU	PM Group	String	3	4
48	AV	ID 1	String	10	12
49	AW	ID 2	String	10	12
50	AX	Service User Define 1	String	20	22
51	AY	Service User Define 2	String	20	22
52	AZ	Service User Define 3	String	30	32
53	BA	Service User Define 4	String	30	32
54	BB	Service User Define 5	Long Integer	6	4

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
55	BC	Service User Define 6	Long Integer	6	4
56	BD	Service User Define 7	Long Integer	6	4
57	BE	Service User Define 8	Long Integer	6	4
58	BF	Service User Define 9	Date	8	4
59	BG	Service User Define 10	Date	8	4
60	BH	Service User Define 11	Date	8	4
61	BI	Service User Define 12	Date	8	4
62	BJ	Service User Define 18	Check Box	1	2
63	BK	Service User Define 19	Check Box	1	2
64	BL	Service User Define 20	Check Box	1	2
65	BM	Service User Define 21	Check Box	1	2
66	BN	Service User Define 22	Currency	14	10
67	BO	Service User Define 23	Currency	14	10

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
68	BP	Service User Define 24	Currency	14	10
69	BQ	Service User Define 25	Currency	14	10
70	BR	Out of Service Flag	Check Box	1	2
71	BS	Out of Service Date	Date	1	2
72	BT	Out of Service Time	Time	6	4
73	BU	Out of Service By	String	15	16
74	BV	Out of Service Reason	String	30	32
75	BW	WSBarCodeID	String	50	50
76	BX	Startup By	String	50	50
77	BY	Startup Job Number	String	17	17
78	BZ	Shipped Date	Date		
79	CA	Vibration Date	Date		
80	CB	Overhaul Date	Date		
81	CC	ECT Date	Date		
82	CD	Conversion Date	Date		
83	CE	Blanket PO Check Box	Tiny Integer		
84	CF	Blanket PO Number	String	17	17

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
85	CG	Original Blanket PO Amount	Currency		
86	CH	Blanket PO Amount Spent	Currency		
87	CI	Blanket PO Amount Remaining	Currency		
88	CJ	Blanket PO Expiration Date	Date		

Contract Master File

Import File: **SVCT0002.CSV (Comma) or SVCT0002.TXT (Tab)**
Warehouse File: **SV_Maint_MSTR_IMP_WHSE**
Destination File: **SV_Maint_MSTR (SV00500)**
Quicksearch File: **SV_Contract_Quicksearch (SV00053)**

*Indicates validated fields, and must contain data.

**Indicates validated, but can be left empty.

***Indicates calculated field. If value is entered, it will be overwritten.

⚠ Set 'Escalation Date' (89,CK) with the anniversary date.

'Last Review User ID' (97,CS) specifies the Master Tax Schedule used.
If 'Contract Billing Date' (57,BE) is empty, it will be set to 1.
If 'Contract Service Date' (58,BF) is empty, it will be set to 1.
If 'Escalation Frequency' (88,CJ) is empty, it will be set to 'AT ANNIVERSARY'.
If 'Anniversary Date' (93,CO) is empty, it will be set to 'Contract Expiration Date'.

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
1	A	*Customer Number	String	15	16
2	B	*Address Code	String	15	16
3	C	*Contract Number	String	10	12
4	D	User ID	String	15	16

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
5	E	Technician ID	String	15	16
6	F	Technician Team	String	15	16
7	G	Technician	String	10	12
8	H	Corporate Customer Number	String	15	16
9	I	Corporate Contract Number	String	20	22
10	J	Corporate Invoice Number	String	17	18
11	K	*Contract Amount	Currency	14	10
12	L	*Bill Freq	Drop-Down List 1 = Monthly 2 = Quarterly 3 = Annual 4 = Semi-annual 5 = Other 6 = Every Other Month	1	2
13	M	Signature Close Date	Date	8	4
14	N	Amount Billed	Currency	19	10
15	O	Salesperson ID	String	15	16
16	P	Annual Contract Value	Currency	14	10
17	Q	Revenue Recognition Method ID	Integer	2	2

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
18	R	Invoice Style	Integer	2	2
19	S	Multiyear Contract Flag	Boolean	1	2
20	T	*Contract Start Date	Date	8	4
21	U	*Contract Expiration Date	Date	8	4
22	V	Estimate Equipment	Currency	14	10
23	W	Estimate Labor	Currency	14	10
24	X	Estimate Material	Currency	14	10
25	Y	Estimate Subs	Currency	14	10
26	Z	Estimate Other	Currency	14	10
27	AA	***Estimate Total Cost	Currency	14	10
28	AB	Estimate Hours	Long Integer	6	4
29	AC	Estimate Labor 1	Currency	14	10
30	AD	Estimate Labor 1 Hours	Long Integer	6	4
31	AE	Estimate Labor 2	Currency	14	10
32	AF	Estimate Labor 2 Hours	Long Integer	6	4
33	AG	Estimate Labor 3	Currency	14	10

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
34	AH	Estimate Labor 3 Hours	Long Integer	6	4
35	AI	Estimate Labor 4	Currency	14	10
36	AJ	Estimate Labor 4 Hours	Long Integer	6	4
37	AK	Estimate Labor 5	Currency	14	10
38	AL	Estimate Labor 5 Hours	Long Integer	6	4
39	AM	Estimate Total Labor	Currency	14	10
40	AN	Estimate Total Labor Hrs	Long Integer	6	4
41	AO	Budget Group	Radio Group	0	2
42	AP	Contract Description	String	30	32
43	AQ	User Define 1a	String	30	32
44	AR	User Define 2a	String	30	32
45	AS	User Define 3a	String	30	32
46	AT	User Define 4a	String	30	32
47	AU	Service User Define 3	String	30	32
48	AV	Service User Define 5	Long Integer	6	4
49	AW	Service User Define 6	Long Integer	6	4

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
50	AX	Service User Define 9	Date	8	4
51	AY	Service User Define 10	Date	8	4
52	AZ	Service User Define 18	Check Box	1	2
53	BA	Service User Define 19	Check Box	1	2
54	BB	Service User Define 22	Currency	14	10
55	BC	Service User Define 23	Currency	14	10
56	BD	Service User Define 24	Currency	14	10
57	BE	Contract Billing Date	Integer	2	2
58	BF	Contract Service Date	Integer	2	2
59	BG	Closed	Boolean	1	2
60	BH	Auto Bill	Check Box	1	2
61	BI	Purchase Order	String	15	16
62	BJ	Last Fiscal Day	Date	6	4
63	BK	*Divisions	String	15	16
64	BL	Auto Date	Date	6	4
65	BM	Cancel Box	Check Box	1	2

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
66	BN	Hold	Check Box	1	2
67	BO	Contract NTE Units	Long Integer	8	4
68	BP	Contract Annual Units	Long Integer	8	4
69	BQ	Equipment ID	String	10	12
70	BR	Warranty Check Box	Check Box	1	2
71	BS	Time Zone	String	3	4
72	BT	SV Language ID	Integer	2	2
73	BU	Base Currency ID	String	15	16
74	BV	Billing Currency ID	String	15	16
75	BW	Local Currency ID	String	15	16
76	BX	Hold Reason ID	Integer	4	2
77	BY	Billing Equipment	Currency	14	10
78	BZ	Billing Material	Currency	14	10
79	CA	Billing Labor	Currency	14	10
80	CB	Billing Subs	Currency	14	10
81	CC	Billing Other	Currency	14	10
82	CD	Billing Percentage Equip	Currency	8	10
83	CE	Billing Percentage Material	Currency	8	10

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
84	CF	Billing Percentage Labor	Currency	8	10
85	CG	Billing Percentage Subs	Currency	8	10
86	CH	Billing Percentage Other	Currency	8	10
87	CI	Current Billing Amount	Currency	14	10
88	CJ	Escalation Frequency	String	15	16
89	CK	Escalation Date	Date	6	4
90	CL	Escalation Notification Days	Integer	3	2
91	CM	Next Escalation Date	Date	6	4
92	CN	Begin Date CY	Date	6	4
93	CO	Anniversary Date	Date	6	4
94	CP	Evergreen Contract Flag	Boolean	1	2
95	CQ	Contract Units Measure	String	15	16
96	CR	Last Review Date	Date	6	4
97	CS	Last Review User ID	String	15	16

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
98	CT	Contract Internal Name **Note:** This represents the Contract Type field.	String	15	16
99	CU	Automatic Escalation Flag	Boolean	1	2
100	CV	*Bill Customer Number	String	15	16
101	CW	*Bill Address Code	String	15	16

Contract Task Master File

Import File: **SVCT0001.CSV (Comma) or SVCT0001.TXT (Tab)**
Warehouse File: **SV_Contract_Task_MSTR_IMP_WHSE**
Destination Files: **SV_Contract_Task_MSTR (SV00582), SV_Contract_Task_Schedule (SV00585**

*Indicates validated fields, and must contain data.

**Indicates validated, but can be left empty.

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
1	A	*Customer Number	String	15	16
2	B	*Address Code	String	15	16
3	C	Customer Contract Number	String	15	16
4	D	User ID	String	15	16
5	E	Technician ID	String	15	16
6	F	Technician Team	String	15	16

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
7	G	Subcontractor ID (not used)	String	15	16
8	H	*Contract Number	String	10	12
9	I	*Equipment ID	String	10	12
10	J	Equipment Type	String	30	32
11	K	*Task Code	String	10	12
12	L	Contract Task List ID	String	10	12
13	M	System	String	15	16
14	N	Major	String	15	16
15	O	Sub 1	String	15	16
16	P	Sub 2	String	15	16
17	Q	Sub 3	String	15	16
18	R	Sub 4	String	15	16
19	S	Task Description	String	60	62
20	T	Signature Close Date	Date	8	4
21	U	Inactive	Check Box	1	2
22	V	Estimate Hours	Long Integer	6	4
23	W	Estimate Labor	Currency	14	10
24	X	Estimate Labor 1	Currency	14	10

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
25	Y	Estimate Labor 1 Hours	Long Integer	6	4
26	Z	Estimate Labor 2	Currency	14	10
27	AA	Estimate Labor 2 Hours	Long Integer	6	4
28	AB	Estimate Labor 3	Currency	14	10
29	AC	Estimate Labor 3 Hours	Long Integer	6	4
30	AD	Estimate Labor 4	Currency	14	10
31	AF	Estimate Labor 4 Hours	Long Integer	6	4
32	AG	Estimate Labor 5	Currency	14	10
33	AH	Estimate Labor 5 Hours	Long Integer	6	4
34	AI	Estimate Equipment	Currency	14	10
35	AJ	Estimate Material	Currency	14	10
36	AK	Estimate Subs	Currency	14	10
37	AL	Estimate Other	Currency	14	10
38	AM	Estimate Total Cost	Currency	14	10
39	AN	Billable Equipment	String	15	16
40	AO	Billable Material	Currency	14	10
41	AP	Billable Subs	Currency	14	10

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
42	AQ	Billable Other	Currency	14	10
43	AR	Billable Labor 1	Currency	14	10
44	AS	Billable Labor 2	Currency	14	10
45	AT	Billable Labor 3	Currency	14	10
46	AU	Billable Labor 4	Currency	14	10
47	AV	Billable Labor 5	Currency	14	10
48	AW	• Frequency	String	15	16
49	AX	*Schedule	Integer	2	2
50	AY	Optional	Check Box	1	2
51	AZ	*Skill Level	String	15	16
52	BA	Material Kit Required	String	30	32
53	BB	Material Kit Quantity	Long Integer	7	4
54	BC	Tool Kit Required	String	15	16
55	BD	Coverage Code	Integer	5	2
56	BE	Task User Define1	String	20	22
57	BF	Task User Define2	String	20	22
58	BG	Task User Define3	String	30	32
59	BH	Task User Define4	String	30	32

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
60	BI	Task User Define5	Long Integer	6	4
61	BJ	Task User Define6	Long Integer	6	4
62	BK	Task User Define7	Long Integer	6	4
63	BL	Task User Define8	Long Integer	6	4
64	BM	Task User Define9	Date	8	4
65	BN	Task User Define10	Date	8	4
66	BO	Task User Define11	Date	8	4
67	BP	Task User Define12	Date	8	4
68	BQ	Task User Define13	Currency	14	10
69	BR	Task User Define14	Currency	14	10
70	BS	Task User Define15	Currency	14	10
71	BT	Task User Define16	Currency	14	10
72	BU	Task User Define17	Currency	14	10
73	BV	Task User Define18	Check Box	1	2
74	BW	Task User Define19	Check Box	1	2
75	BX	Task User Define20	Check Box	1	2
76	BY	Task User Define21	Check Box	1	2
77	BZ	Task Hours	Long Integer	6	4
78	CA	Week 1	Check Box	1	2

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
79	CB	Week 2	Check Box	1	2
80	CC	Week 3	Check Box	1	2
81	CD	Week 4	Check Box	1	2
82	CE	Week 5	Check Box	1	2
83	CF	Time Zone	String	3	4
84	CG	SV Language ID	Integer	2	2
85	CH	Base Currency ID	String	15	16
86	CI	Billing Currency ID	String	15	16
87	CJ	Local Currency ID	String	15	16
88	CK	PM Group	String	3	4
89	CL	ID 1	String	10	12
90	CM	ID 2	String	10	12
91	CN	YR MOD	Integer	2	2
92	CO	YR REM	Integer	2	2

Job Costs Master File

Import File: **SVJC0001.CSV (Comma) or SVJC0001.TXT (Tab)**
Warehouse File: **SV_Job_Costs_IMP_WHSE**
Destination File: **SV_Job_Costs_WORK (SV000810)**

*Indicates validated fields, and must contain data.

**Indicates validated, but can be left empty.

***Indicates validated for non-labor only (Cost Code: 1, 2, 4, 5).

****Indicates validated for labor only (Cost Code: 6, 7, 8, 9, 10).
____ Indicates assigned by Service Management or Microsoft Dynamics GP.
Italic Indicates assigned by Service Management, if empty.

> ⚠ To modify an existing Job Costs WORK record, fill in the proper values for the 'Service Call ID', 'Reference TRX Number', and 'Sequence Number' fields. To add new Job Costs WORK records, leave the 'Reference TRX Number' and 'Sequence Number' fields empty, the next available numbers will automatically be generated.

'Job Name' (10,J) is set to 'Location Name' (26,Z).
'Job Type' (11,K) is set to 'SERVICE'.
'Transaction Source' (21,U) is set to 'MANUAL'.
'Billing Amount' (22,V) is calculated per the Hours and Pay Rate.
'Dynamics Status' (27,AA) is set to 'OPEN'.
'Signature Status' (28,AB) is set to 'OPEN'.
'Batch Number' (29,AC) is set to 'IMPORTED'.

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
1	A	*Service Call ID	String	17	18
2	B	Call Invoice Number	String	17	18
3	C	User ID	String	15	16
4	D	Technician ID	String	15	16
5	E	Technician Team	String	15	16
6	F	** *Reference TRX Number*	String	17	18
7	G	*Customer Number	String	15	16
8	H	*Address Code	String	15	16
9	I	**Sequence Number	Long Integer	10	4
10	J	Job Name	String	30	32
11	K	Job Type	String	7	8
12	L	*Cost Code	Long Integer	8	4

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
13	M	Cost Code Description	String	30	32
14	N	Task Code	String	10	12
15	O	Document Type	Drop-Down List	0	2
16	P	Document Amount	Currency	17	10
17	Q	*Document Date	Date	8	4
18	R	Transaction Description	String	30	32
19	S	Billable Check Box	Check Box	1	2
20	T	Taxable	Check Box	1	2
21	U	Transaction Source	String	25	26
22	V	Billing Amount	Currency	14	10
23	W	***Vendor ID	String	15	16
24	X	Vendor Name	String	64	66
25	Y	**Equipment ID	String	10	12
26	Z	Equipment Type	String	30	32
27	AA	Dynamics Status	String	4	6
28	AB	Signature Status	String	4	6
29	AC	Batch Number	String	15	16
30	AD	Batch Source	String	15	16

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
31	AE	****TRX Hours/Units	Long Integer	6	4
32	AF	****Employee ID	String	15	16
33	AG	Employee Name	String	40	42
34	AH	Voucher Number - WORK	String	17	18
35	AI	OH Amount	Currency	14	10
36	AJ	Extended Cost	Currency	17	10
37	AK	***WS Extended Cost	Currency	14	10
38	AL	TRX QTY	Currency	17	10
39	AM	U Of M	String	8	10
40	AN	Item Number	String	30	32
41	AO	Item Description	String	50	52
42	AP	Unit Price	Currency	17	10
43	AQ	Job Title	String	6	8
44	AR	****Pay Record	String	6	8
45	AS	Pay Rate	Currency	14	10
46	AT	Billing Rate	Currency	14	10
47	AU	Add New Equipment Record	Check Box	1	2
48	AV	New Equipment ID	String	10	12

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
49	AW	Signature Model Number	String	20	22
50	AX	Signature Serial Number	String	40	42
51	AY	Manufacturer ID	String	15	16
52	AZ	Note Check Box	Check Box	1	2
53	BA	SV Language ID	Integer	2	2
54	BB	Base Currency ID	String	15	16
55	BC	Base Curr Conversion Factor	Currency	14	10
56	BD	Billing Currency ID	String	15	16
57	BE	Billing Curr Conversion Factor	Currency	14	10
58	BF	Local Currency ID	String	15	16
59	BG	Subcontractor Percent	Long Integer	6	4

Employee Master File

Import File: **SVEM0001.CSV (Comma) or SVEM0001.TXT (Tab)**
Warehouse File: **SV_Employee_IMP_WHSE**
Destination Files: **UPR_MSTR (UPR00100), UPR_MSTR_Pay_Type (UPR00400), SV_Lookup_Tech_MSTR (SV00115)**

*Indicates validated fields, and must contain data.

**Indicates validated, but can be left empty.

⚠ If 'Technician' (93, CO) is empty, it will be set to the 'Employee ID' (32,AF).

'Base Pay Record' (45,AS) is not validated.
'Pay Unit' (47,AU) must be present if a 'Pay Type' (44,AR) of 1 or 3 is entered.
'Base Pay Record' (45,AS) must be present if a 'Pay Type' (44,AR) of 6, 7, 8, or 9 is entered.

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
1	A	*Employee ID	String	15	16
2	B	*Pay Record (Pay Code)	String	6	8
3	C	Employee Class	String	15	16
4	D	Inactive	checkbox	1	2
5	E	*Last Name	String	20	22
6	F	*First Name	String	15	16
7	G	Middle Name	String	15	16
8	H	Address 1	String	30	32
9	I	Address 2	String	30	32
10	J	City	String	30	32
11	K	State	String	4	30
12	L	Country	String	20	22
13	M	Zip Code	String	10	12
14	N	Phone Number	String	14	22
15	O	*Social Security Number	String	15	16
16	P	Birth Date	Date	6	4

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
17	Q	Gender	Drop-Down List 1 = Male 2 = Female	6	2
18	R	Ethnic Origin	Drop-Down List 1 = Caucasian 2 = Native American 3 = Black 4 = Asian 5 = Hispanic 6 = Other	15	2
19	S	Part Time	checkbox	1	2
20	T	*Department	String	6	8
21	U	*Job Title	String	6	8
22	V	Which Cash Account For Pay	Radio Group	0	2
23	W	Account Index	Long Integer	14	4
24	X	*Work Hours Per Year	Integer	4	2
25	Y	Start Date	Date	6	4
26	Z	Date Employee Inactivated	Date	8	4
27	AA	Reason Employee Inactivated	String	30	32
28	AB	Minimum Net Pay	Currency	14	10
29	AC	Suta State	String	2	4

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
30	AD	Workers Comp	String	6	8
31	AE	Auto Accrue Vacation	checkbox	16	2
32	AF	Vacation Accrual Amount	Long Integer	6	4
33	AG	Vacation Accrual Method	Radio Group	0	2
34	AH	Vacation Hours Per Year	Long Integer	6	4
35	AI	Vacation Available	Long Integer	6	4
36	AJ	Auto Accrue Sick Time	checkbox	1	2
37	AK	Sick Time Accrual Method	Radio Group	0	2
38	AL	Sick Time Accrual Amount	Long Integer	6	4
39	AM	Sick Time Available	Long Integer	6	4
40	AN	Sick Time Hours Per Year	Long Integer	6	4
41	AO	User Defined 1	String	20	22
42	AP	User Defined 2	String	20	22
43	AQ	Note Index	Currency	14	10

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
44	AR	*Pay Type	Drop-Down List 1 = Hourly 2 = Salary 3 = Piecework 4 = Commission 5 = Business Expense 6 = Overtime 7 = Double Time 8 = Vacation 9 = Sick 10 = Holiday 11 = Pension 12 = Other 13 = Earned Inc. Credit 14 = Charged Tips 15 = Reported Tips 16 = Min. Wage Bal.	20	2
45	AS	Base Pay Record	String	6	8
46	AT	*Pay Rate Amount	Currency	14	10
47	AU	Pay Unit	String	25	26
48	AV	Pay Unit Period	Drop-Down List 1 = Weekly 2 = Biweekly 3 = Semimonthly 4 = Monthly 5 = Quarterly 6 = Semiannually 7 = Annually 8 = Daily/Misc.	19	2

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
49	AW	Report As Wages	checkbox	1	2
50	AX	Taxable	checkbox	1	2
51	AY	Subject To Federal Tax	checkbox	1	2
52	AZ	Subject To Social Security	checkbox	1	2
53	BA	Subject To Medicare	checkbox	1	2
54	BB	Subject To State Tax	checkbox	1	2
55	BC	Subject To Local Tax	checkbox	1	2
56	BD	Subject To Futa	checkbox	1	2
57	BE	Subject To Suta	checkbox	1	2
58	BF	Flat Federal Tax Rate	Integer	4	2
59	BG	Flat State Tax Rate	Integer	4	2
60	BH	Pay Period	Drop-Down List 1 = Weekly 2 = Biweekly 3 = Semimonthly 4 = Monthly 5 = Quarterly 6 = Semiannually 7 = Annually 8 = Daily/Misc.	19	2
61	BI	Pay Per Period	Currency	14	10

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
62	BJ	Max Pay Per Period	Currency	14	10
63	BK	Pay Advance	Currency	14	10
64	BL	Accrue Vacation	checkbox	1	2
65	BM	Accrue Sick Time	checkbox	1	2
66	BN	W2 Box Number	Integer	2	2
67	BO	W2 Box Label	String	6	8
68	BP	Pay Advance Taken	Currency	14	10
69-80	BQ-CB	MTD Hours	Long Integer	6	4
81-92	CC-CN	MTD Wages	Currency	14	10
93	CO	Technician	String	10	12
94	CP	**Technician Team	String	15	16
95	CQ	Vendor Switch	checkbox	1	2
96	CR	Vendor ID	String	15	16
97	CS	**Branch Name	String	40	42

Job Cost Field Definitions

If you have been using Signature before the Signature 2016 R3 release, the Job Cost change order rules were updated with that release. For more information, see Updated change order rules (page 72).

- Job Master File (page 64)
- Job Detail Master File (page 66)
- Billing Codes Master File (page 70)
- Change Order Master File (page 70)
- Change Order Detail Master File (page 72)
- JC Vendor Master File (page 74)

- Cost Code Master File (page 76)

Job Master File

Import File: **JCJM0001.CSV (Comma) or JCJM0001.TXT (Tab)**
Warehouse File: **JC_Job_MSTR_IMP_WHSE**
Destination File: **JC_Job_MSTR (JC00102)**

- The 'WS Job Number' field has a maximum length of 17 characters. Job numbers longer than this will be cut off.
- If you are importing a certified payroll job, enter "1" in the 'Certified Payroll' field. If the job is not certified payroll, leave this field blank.

*Indicates validated fields, and must contain data.

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
1	A	*WS Job Number	String	17	18
2	B	*WS Job Name	String	30	32
3	C	Project Number	String	17	18
4	D	*Divisions	String	15	16
5	E	*Customer Number	String	15	16
6	F	*Job Address Code	String	15	16
7	G	*Job Billto Address Code	String	15	16
8	H	Estimator ID	String	15	16
9	I	WS Manager ID	String	15	16
10	J	Contract Type	Drop-Down List 1 = Fixed Amount 2 = Cost Plus 3 = Cost Plus NTE	1	1

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
11	K	WS Billing Type	Drop-Down List 1 = Standard 2 = User Defined 3 = Cost Code 4 = Trx. Level 5 = Project Billing 6 = SOP 7 = Project Bill Code 8 = Project Trx. Level 9 = Project Allocated Revenue	1	1
12	L	*Tax Schedule ID	String	15	16
13	M	Suta State	String	2	4
14	N	Local Tax	String	6	8
15	O	Rate Class	String	15	16
16	P	Bid Due Date	Date	6	6
17	Q	Schedule Start Date	Date	6	6
18	R	Scheduled Completion Date	Date	6	6
19	S	JC Contract Number	String	15	16
20	T	Original Contract Amount	Currency	14	14
21	U	Contract Maximum Bill Amount	Currency	14	14

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
22	V	Retention %	Currency	14	14
23	W	Tax Exempt Number	String	15	16
24	X	Certified Payroll	Check Box	1	2
25	Y	WS Inactive	Check Box	1	2
26	Z	User Define 1	String	30	32
27	AA	User Define 2	String	30	32
28	AB	User Defined 1	String	20	22
29	AC	User Defined 2	String	20	22
30	AD	User Defined Dollar 1	Currency	14	14
31	AE	User Defined Dollar 2	Currency	14	14
32	AF	User Defined Date 1	Date	8	8
33	AG	User Defined Date 2	Date	8	8

Job Detail Master File

Import File: **JCJD0001.CSV (Comma) or JCJD0001.TXT (Tab)**
Warehouse File: **JC_Job_Detail_MSTR_IMP_WHSE**
Destination File: **JC_Job_Detail_MSTR (JC00701)**

*Indicates validated fields, and must contain data.

**Indicates validated, but can be left empty.

⚠ 'Labor Group Name' (42, AP) must be validated if a 'Profit Type Number' (9,I) of 9 is entered.

'WS Account Index 1' (43, AQ) must be validated if using the Cost Code posting option.
The Change Order Estimate Cost (U) and Change Order Estimate Units (AC) should be empty when importing this file.

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
1	A	*WS Job Number	String	17	18
2	B	Project Number	String	17	18
3	C	*Cost Code Number 1	Composite	4	4
4	D	*Cost Code Number 2	Composite	4	4
5	E	*Cost Code Number 3	Composite	4	4
6	F	*Cost Code Number 4	Composite	4	4
7	G	*Cost Code Description	String	30	32
8	H	*Cost Element	Integer	3	3
9	I	*Profit Type Number	Integer	2	2
10	J	*Profit Amount	Currency	14	14
11	K	WS Manager ID	String	15	16
12	L	Estimated Measure Code	String	6	8
13	M	Production Measure Code	String	6	8

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
14	N	*Type of Transaction	Drop-Down List 1 = All 2 = Inventory Item 3 = Vendor ID 4 = Purchase Order	1	1
15	O	Workers Comp	String	6	8
16	P	Track Production Qty	Check Box	1	2
17	Q	Production Estimate Qty	Currency	14	14
18	R	Production Qty/Unit	Currency	14	14
19	S	Production Best	Currency	12	12
20	T	Cost Code Estimated Cost	Currency	14	14
21	U	Change Order Estimated Cost	Currency	14	14
22	V	Cost Code Rvsd Estimated Cost	Currency	14	14
23	W	Original Estimate Units	Currency	14	14
24	X	Cost Code Estimated Units	Currency	14	14
25	Y	Estimated Amt/ Units	Currency	14	14
26	Z	Scheduled Completion Date	Date	6	6

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
27	AA	Scheduled Start Date	Date	6	6
28	AB	Field % Complete	Integer	5	5
29	AC	Change Order Estimated Units	Currency	14	14
30	AD	User Define 1	String	30	32
31	AE	User Define 2	String	30	32
32	AF	User Defined 1	String	20	22
33	AG	User Defined 2	String	20	22
34	AH	User Defined Dollar 1	Currency	14	14
35	AI	User Defined Dollar 2	Currency	14	14
36	AJ	User Defined Date 1	Date	8	8
37	AK	User Defined Date 2	Date	8	8
38	AL	Vendor Number	String	25	26
39	AM	Item Number	String	30	32
40	AN	Purchase Order Number	String	20	22
41	AO	Rate Per Unit	Currency	14	14
42	AP	**Labor Group Name	String	15	16

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
43	AQ	WS Account Index 1	Long Integer	14	14

Billing Codes Master File

Import File: **JCBC0001.CSV (Comma) or JCBC0001.TXT (Tab)**
Warehouse File: **JC_Billing_Codes_MSTR_IMP_WHSE**
Destination File: **JC_Billing_Codes_MSTR (JC00601)**

*Indicates validated fields, and must contain data.

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
1	A	*WS Job Number	String	17	18
2	B	*Bill Code Description	String	30	32
3	C	*Bill Code Number	String	26	28
4	D	*Cost Element	Integer	3	3
5	E	*Total Billable Amount	Currency	14	14
6	F	Bill %	Integer	5	5

Change Order Master File

Import File: **JCCO0001.CSV (Comma) or JCCO0001.TXT (Tab)**
Warehouse File: **JC_Change_Orders_MSTR_IMP_WHSE**
Destination File: **JC_Change_Orders_MSTR (JC01001)**

*Indicates validated fields, and must contain data.
** New rules for change order type

⚠ 'Posting Status' (6,F) must have a value of 2, or be empty.

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
1	A	*WS Job Number	String	17	18
2	B	Project Number	String	17	18
3	C	*Change Order #	String	14	16
4	D	*Change Order Status	Drop-Down List 1 = Confirmed 2 = In-Process 3 = Pending 4 = User Defined 2 5 = User Defined 3	1	1
5	E	*Change Order Type**	Drop-Down List 1 = Fixed Amount 2 = Cost Plus 3 = Cost Plus NTE	1	1
6	F	Posting Status	Integer	1	1
7	G	*Change Order Description	String	30	32
8	H	Change Order Estimated Cost	Currency	14	14
9	I	Confirmed Modified Date	Date	8	8
10	J	Confirmed Modified User ID	String	15	16
11	K	User Defined CO 1	String	15	16
12	L	User Defined CO 2	String	15	16

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
13	M	User Defined CO 3	String	15	16
14	N	User Defined CO 4	String	15	16
15	O	User Defined Date 1	Date	8	8
16	P	User Defined Date 2	Date	8	8
17	Q	User Defined Date 3	Date	8	8
18	R	User Defined Date 4	Date	8	8
19	S	Posting Date	Date	8	8
20	T	Change Order Maximum Amount	Currency	14	14

**

Update to Change Order Rules

If you are using the RPO revenue recognition method, the updated change order rules were implemented in the Signature 2016 R3 release. The change orders that can be created are limited based on the job's contract type:

Job Type	Change Order Type
Fixed	Fixed, Cost Plus
Cost Plus	N/A - None
Cost Plus NTE	Cost Plus NTE*

**By design, a Cost Plus NTE change order increases the overall NTE amount for the job. It is not tracked as a separate NTE change order.*

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Change Order Detail Master File

Import File: **JCCOD0001.CSV (Comma) or JCCOD0001.TXT (Tab)**
Warehouse File: **JC_Chg_Ord_Detail_MSTR_IMP_WHSE**
Destination File: **JC_Chg_Ord_Detail_MSTR (JC01002)**

*Indicates validated fields, and must contain data.

⚠ 'Posting Status' (12,L) must have a value of 2, or be empty.

Cost codes applied to a change order must already exist on the job record.

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
1	A	*WS Job Number	String	17	18
2	B	*Change Order #	String	14	16
3	C	*Cost Code Number 1	Composite	4	4
4	D	*Cost Code Number 2	Composite	4	4
5	E	*Cost Code Number 3	Composite	4	4
6	F	*Cost Code Number 4	Composite	4	4
7	G	*Cost Code Description	String	30	32
8	H	*Cost Element	Integer	3	3
9	I	Estimated Measure Code	String	6	8
10	J	WS Manager ID	String	15	16
11	K	*Type of Transaction	Drop-Down List 1 = All 2 = Inventory Item 3 = Vendor ID 4 = Purchase Order	1	1

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
12	L	Posting Status	Integer	5	5
13	M	Change Order Estimated Units	Currency	14	14
14	N	CO Estimated Amt/ Units	Currency	14	14
15	O	Change Order Estimated Costs	Currency	14	14
16	P	Scheduled Completion Date	Date	6	6
17	Q	Schedule Start Date	Date	6	6
18	R	Vendor Number	String	25	26
19	S	Inventory Item Number	String	20	22
20	T	Purchase Order Number	String	20	22

JC Vendor Master File

Import File: **JCVM0001.CSV (Comma) or JCVM0001.TXT (Tab)**
Warehouse File: **JC_Vendor_MSTR_IMP_WHSE**
Destination File: **JC_Vendor_MSTR (JC01501)**

*Indicates validated fields, and must contain data.

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
1	A	*WS Job Number	String	17	18
2	B	Project Number	String	17	18
3	C	*Vendor ID	String	15	16

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
4	D	Vendor Name	String	64	66
5	E	*Address Code	String	15	16
6	F	*Vendor Contract Type	Drop-Down List 1 = NTE 2 = Lump Sum 3 = Unit Price		
7	G	*Original Contract Amount	Currency	14	14
8	H	Retention %	Currency	14	14
9	I	Mod Rate	Integer	3	3
10	J	Purchase Order Number	String	14	16
11	K	Contract Date	Date	8	8
12	L	Insurance Certificate on File	Date	8	8
13	M	Insurance Expiration Date	Date	8	8
14	N	Submit Date	Date	8	8
15	O	Resubmit Date	Date	8	8
16	P	Approved Date	Date	8	8
17	Q	Disapproved Date	Date	8	8
18	R	User Define 1	String	30	32
19	S	User Define 2	String	30	32

Tab Position (.txt file)	Excel Column (.csv file)	Field Name	Storage Type	Keyable	Storage
20	T	User Defined 1	String	20	22
21	U	User Defined 2	String	20	22
22	V	User Defined Dollar 1	Currency	14	14
23	W	User Defined Dollar 2	Currency	14	14
24	X	User Defined Date 1	Date	6	6
25	Y	User Defined Date 2	Date	6	6

Cost Code Master File

Import File: **JCCC0001.CSV (Comma) or JCCC0001.TXT (Tab)**
Warehouse File: **JC_Cost_Codes_MSTR_IMP_WHSE**
Destination File: **JC_Cost_Codes_MSTR (JC40202)**

*Indicates validated fields, and must contain data.

'WS Account Index 1' (20,T) must be validated if using the Cost Code posting option.

Tab Position (.txt file)	Excel Column	Field Name	Storage Typ	Keyable	Storage
1	A	*Cost Code Number1	Composite		
2	B	*Cost Code Number 2	Composite		
3	C	*Cost Code Number 3	Composite		
4	D	*Cost Code Number 4	Composite		

Tab Position (.txt file)	Excel Column	Field Name	Storage Typ	Keyable	Storage
5	E	*Cost Code Description	String	30	32
6	F	*Cost Element	Integer	2	2
7	G	*Profit Type Number	Integer	2	2
8	H	*Profit Amount	Currency	14	16
9	I	Estimated Measure Code	String	6	8
10	J	Production Measure Code	String	15	16
11	K	*Type of Transaction	Drop-Down List 1 = All 2 = Inventory Item 3 = Vendor ID 4 = Purchase Order	1	1
12	L	Workers Comp	String	6	8
13	M	Estimated Amt/ Units	Currency	14	14
14	N	Cost Code Estimated Cost	Currency	14	14
15	O	Cost Code Rvsd Estimated Cost	Currency	14	14
16	P	Production Estimate Qty	Currency	14	14
17	Q	Production Qty/Unit	Currency	14	14

Tab Position (.txt file)	Excel Column	Field Name	Storage Typ	Keyable	Storage
18	R	Vendor Number	String	25	26
19	S	Item Number	String	30	32
20	T	WS Account Index 1	Long Integer	14	14

Contact Information

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Hours: Normal support hours are 7:00 a.m. to 6:00 p.m. Central Time. After-hours and weekend support is available for an additional charge. Please contact WennSoft Support for more information.

WennSoft will be closed in observance of the following holidays: New Year's Day, Presidents' Day, Memorial Day, Juneteenth, Independence Day, Labor Day, Veterans' Day, Thanksgiving Day, the Day after Thanksgiving, Christmas Day, and the Day after Christmas.

Support Plans

We're committed to providing the service you need to solve your problems and help your team maximize productivity.

We offer several Signature Enhancement and Support Plans to meet your needs, and Extended Support Plans for retired product versions available at https://www.wennsoft.com/wsportal.

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