WennSoft Enhancements by Releases

This spreadsheet gives you a quick look at all the enhancements added to WennSoft products over the years. It's organized by product and release year so you can easily see what's new, what's changed, and when it happened. Use it to check out past updates, plan for upgrades, or just stay in the loop on what features are available. It's a handy reference for anyone who wants to keep track of improvements without digging through release notes.

WennSoft	Service Management *Supported Versions: 2025* and 2024 (2018 R9)	
Enhancement	**Description**	**Version**
Refrigerant Tracking Compliance Updates	**Refrigerant tracking has been updated to comply with the American Innovation and Manufacturing (AIM) Act's 2026 reporting requirements.** The AIM Act brings major changes to refrigerant management. Businesses must meet new regulatory requirements for tracking, reporting, and leak detection by January 1, 2026. Systems with 15 pounds or more of high GWP refrigerant must follow stringent leak repair timelines beginning in 2026. **We've added four new refrigerant equipment types**: 7 - Small Appliance < 15 pounds 8 - Mid-Size Appliance 5 to 50 pounds 9 - Commercial Refrigeration >= 1,500 pounds (GWP > 53) 10 - Industrial Process Refrigeration >= 1,500 pounds (GWP > 53) **We've removed the 6 - Mid-Size Appliance 5 to 50 pounds refrigerant tracking type** from the drop-down selection, as it is no longer exempt in 2026. Equipment records that are currently using this option are permitted to continue using it. **Automatic Leak Detection (ALD) systems become mandatory. We've added an Automatic Leak Detection Installed checkbox on the equipment record's Additional Fields window.** Systems with 1,500 pounds (or more) of high-GWP refrigerant will need to have Automatic Leak Detection (ALD) system installed by January 1, 2026 for new systems, and by January 1, 2027 for existing systems. Any equipment that falls in the >= 1,500 pounds of refrigerant will need to be re-categorized. Leak rate calculations have not changed for Commercial (20%) and Industrial (30%) systems. - For new installations on or after January 1, 2026—immediately upon or within 30 days of equipment installation. - For existing systems installed between 2017 and 2025—by January 1, 2027. **The Refrigerant Tracking Leak Rate Analysis Report has been updated.** You will need to deploy this report to see the updated version.	**2025 (also available for 2024 and 2023 with a separate update available from the Downloads page)**
New Mass Transfer Service Costs to Job Utility Window	Use the Mass Transfer Costs to Job window to filter the completed service calls that are not	**2025**

Enhancement	Description	Version
Certified Payroll reports now work with Service Calls	The Certified Payroll report lists employee information, details of hours worked, hourly rate, gross earned in job, deductions, and net weekly pay for the selected jobs and service calls. Certified Payroll transactions for Service must be run through TimeTrack. TimeTrack history should always be turned on. Using Dynamics GP Payroll for Service transactions will NOT include any Certified payroll functionality.	**2025**
Two Improvements to Contract Equipment Management	**1. Search for Equipment at a Contract Coverage Maintenance Location** Description: Large end customers have many pieces of equipment associated with different contracts, so we've added search capabilities on the contract coverage maintenance screen to quickly find equipment that need to be added to a contract. This greatly saves times by eliminating the need to scroll through tens or hundreds of pieces of equipment and instead jump right to the equipment that needs to be added to the contract. **2. Bulk Add/Remove Contract Equipment** Description: Speed up contract changes by quickly adding or removing equipment associated to a contract within the Contract Coverage Maintenance window.	2024 - 2018 R9
Two Improved Storage Options	**1. Set Default Document Storage Location Option** Description: A new 'Copy to Database' option has been added in the Document Maintenance window to select the Source Document - Copy File, Attach File or Copy to Database. **2. Store Signature Documents and Attachments in WennSoft Cloud Storage** Description: Is your SQL database getting unmanageable regarding size and time to backup? The most likely culprit is the ever-increasing file sizes of pictures and videos that get bigger with each new generation of Smartphone. The new WennSoft Cloud Storage offering solves this by shifting future storage into the Azure Cloud. In some instances, customers will want to migrate some of their existing SQL data into the cloud. For more information on migrating existing SQL data, please reach out to WennSoft Professional Services.	2024 - 2018 R9

Enhancement	Description	Version
Five Time Saving Features	**1. View Service Call Costs without having to Open an Invoice Window** Description: Conveniently view current unposted, committed, and actual costs and anticipated billing information in one place - The Service Call Costs window. Zoom into each cost category and cost type. Note: The window is NOT available when using SOP invoicing. **2. Stop Voids of Payable Transactions on Closed Service Calls** Description: Users can no longer void a PM transaction associated with a closed service call because this can cause the WIP to be off balance. When a user try's to voids the transaction, it displays a pop-up dialog box stating "This transaction is associated with a closed service call and cannot be voided." **3. Attach Documents to Master Contracts** Description: A new button has been added to conveniently attach documents to master contracts. **4. Display an Appointment Date w/out an Associated Time in the Body of an Email (Signature Agent)** Description: A field has been added to store the appointment date without a time associated with it. This is helpful in scenarios to communicate an appointment date to a customer that doesn't yet have a specific time. **5. View Job-Related Recent Activity at a Location** Description: Easily view all jobs associated with the service location directly from the Service Manager window by selecting the new Jobs icon. This icon will be displayed if the selected service location has at least one associated job. You can also access the Job Maintenance, Job Status, and Job Appointments windows from this new window.	2024 - 2018 R9
Updated service invoice stored procedure	We've updated the ws_ServiceCallInvoice_dsInvoice stored procedure to include a QueryID column to each select list to help determine the part of a procedure that may not be working for a specific invoice.	2023 - 2018 R8
New Task Schedule Button	You can now access the Task Schedule for a piece of equipment directly from the Contract Coverage using the new Task Schedule button.	2023
Updates to Mobile PO Edit List	On the Mobile Purchase Order Edit list, we've added Error Code and Error Message information.	2023
Updated Service Call Lookup Window	The Service Call Lookup by Customer window now includes a column for the purchase order number.	2023
Enhanced Resolution Note Snippets	Resolution note snippets can now be created with more than one line. This text field is limited to 255 characters.	2023

Enhancement	Description	Version
Service/Job Appointment Description Update	When the service or job appointment description exceeds 50 characters, an appointment note is created. The note can be marked as Is Internal so that the note does not appear on any customer reports. The note subject is titled Description. The appointment note can be viewed in as an attached note.	2023
Removed the Archive Utility from Signature Utilities	We have removed the Archive Utility from Signature Utilities. It was determined that this may be data damaging when running Check Links after running the Archive Utility.	2023
Optimized Service Manager Window	The Service Manager window has been optimized to load faster after selecting the customer ID.	2023
Optimized Service Call Lookup Window	The Service Call Lookup window performance has been updated to decrease the amount of time before users can select a service call.	2023
Attachments to Service/Job Appointments	We've added the capability to add attachments to service and job appointments by selecting the paperclip icon to the right of the Appointment field. The attachment remains at the service appointment level.	2018 R7
Map2BOB Notification when moving equip	If you are using Map2BOB and are also using any utility that moves equipment or locations, we've added a message that displays after moving the equipment/location. "Please review your Map2BOB records after moving <equipment name> or <location>. You may need to remap the moved equipment or location."	2018 R7
New Note functionality within Service Manager	Users can now view, edit, delete, and add notes on the Service Manager window for customers, location addresses, contract numbers, equipment, and job number.	2018 R7
Maintenance Invoicing Filters	On the Maintenance Invoicing window, we've added the ability to filter and invoice by contract type. If individual contracts that are under the same master contract have different contract types, only the contracts with the filtered contract type will be invoiced.	2018 R7

Enhancement	Description	Version
New Schedule Technician Board Report	Users can now view and/or print the new Schedule Technician Board report that displays in table format and is available from the Report Server only. Schedule is required to view this report. The table displays the technician's name, day/date, and any relevant appointment information including service appointment ID, job ID, and/or activity, customer ID, and estimated hours. **Report options include:** * Start Day: This defaults to the current date. * Show Technicians with No Appointments: Defaults to No. Select Yes to show all technicians. *Enable Schedule Colors: Defaults to True. Schedule colors are set up in Schedule > Settings > Colors. * Hide Weekends: Defaults to No. Select Yes to only show weekdays. * Hide Estimated Hours: Defaults to No. Select Yes to hide the estimated hours on the report. * Technician: Defaults to the technicians currently on the schedule board in Schedule. * Technician Team: Defaults to the technician team(s) associated with the technicians. * Skill Level: Defaults to the skill level(s) associated with the technicians. * Hide Unscheduled: Defaults to True. Select False to show unscheduled appointments.	2018 R7
Tasks Response update	When saving Yes/No, Integer, Numeric, and/or Repair task responses on the service call, the WS Response Date field in the SV00317 table is now populated with the current user date.	2018 R7
Leave Maint. Contracts Open - Settings Option	You now have the option to default Leave Contract Open to always be marked, however, the checkbox is not locked so that users can unmark the checkbox for a specific contract. When you save the Maintenance Options window, you will be asked if you want to roll this option down to open contracts. Select Yes to roll down or select No to mark this for new contracts going forward. If you change this option (unmark the checkbox) and save the Maintenance Options window, the message will display again to roll down the change to all open contracts.	2018 R7

Enhancement	Description	Version
Update Division on Service Call with unposted costs	You can now update the division on a service call if unposted costs exist, provided that the purchase order is 100% committed with no receipts.	2018 R7
Two new columns in Maintenance Contract Tables	We have added two new columns, Created Date and Created By (or Created User), to several Maintenance Contract tables to provide the ability to audit when records have been created and the user who created the record.	2018 R7

Enhancement	Description	Version
Task Codes and Task Lists can now be marked inactive at the setup level while maintaining historical entity record integrity	Task Codes and Task Lists can now be marked inactive at the setup level while maintaining historical entity record integrity. Task codes are inactivated at the setup level in the Task Code Setup window (Setup >Service Management > Lookup Setup > Tasks > Task Codes). Task lists are inactivated in the Task List Setup window (Setup > Service Management > Lookup Setup > Tasks> Task Lists). * Inactive task codes and task lists are filtered out from displaying in any lookup. * Inactive task lists cannot be copied. * When a task code is marked inactive and already exists in a task list, the inactive task code is indicated with a red indicator . * When using hierarchy task lists, if a parent task is inactive, child tasks of that parent task are also inactive on the task list only. (Hierarchy child tasks are not automatically inactivated at the setup level.) * Existing contracts, quotes, and calls, that have task codes or task lists will not be affected by a task code or task list being marked inactive. * When renewing a contract (single, master, or mass), you can print a new Inactive Task or Task List report before renewing. If the contract has tasks that include inactive tasks and/or task lists, this report is automatically generated as well so that users can fix the data (reactivate the task code/task list or remove the inactive task codes or lists from the contract). * When creating a new contract using equipment at the location, if the equipment type has a task list associated, and you choose to automatically add task codes based on equipment type, only the active task codes will be added to the contract. **In Equipment Management:** * Existing scheduled maintenance that has task codes or task lists will not be affected by a task code or task list being marked inactive. * When creating a service call from the On Rental Entry and/or the Rental Agreement Line Entry windows, only active task codes in the Equipment Model task list are added to the service call. (This task list is assigned to the equipment model in the Equipment Model Maintenance window.) * When processing scheduled maintenance to create a service call, only active task codes assigned in the Scheduled Maintenance Type Setup window are added to the service call. **Reports** * The existing Maintenance Task Codes report has been updated to include an Inactive column to indicate inactive task codes. * A new Task Code Task Lists report displays the task code and the task lists that the task	2018 R7
New Mid-Size Equipment for Refrigerant Tracking	We've added a new refrigerant equipment type of Refrigeration Equipment Type 6 for mid-size appliances (5 to 50 pounds), which is an EPA tracking requirement that does not require leak rate analysis.	2018 R7

Enhancement	Description	Version
View Task Comments on MCC Call	For an MCC (maintenance contract computer-generated) call, in the Service Call Tasks window, you can now view the comments that were added to a task. If a task comment exists for the task, a Task Comments button is displayed in the navigation ribbon. Select Task Comments to open a read-only Task Comments window. Task comments, an existing feature, are added to the task in the Maintenance Tasks window by selecting the Notes icon in the scrolling window.	2018 R7
Transfer service call labor costs or billing to a non-labor job cost code	We've added the ability to transfer service call labor costs or billing to a non-labor job cost code. You can also set up the default mapping to link records to a non-labor cost code.	2018 R7
Users can view service call history through the Service Call Audit window	Users can now view service call history by accessing the Service Call Audit window from the Service Call window. The Service Call Audit window displays the history of the service call you are accessing the Service Call Audit window from and includes all the columns from the SV_3000 table. This feature requires the SQL Server Agent to be running. To use this Service Call Audit feature, you will need to: 1. Install the Signature Audit Add-In xx.x.xx.exe file. 2. Setup and enable Service Call Audit from the new Additional option in the Service Options setup window. 3.Access the Service Call Audit window by accessing the Service Call window and selecting Additional > Service Call Audit.	2018 R7

Enhancement	Description	Version
Updates to Mobile Purchase Order Inquiry Window	The Mobile Purchase Order Inquiry window has been updated with the following: * The Mobile Purchase Order Inquiry menu item is now available if Schedule or MobileTech is registered. (Inquiry > Service Management > Mobile Purchase Order Inquiry) Previously this option was available if only MobileTech was registered. * Mobile purchase orders added to job appointments can now be processed in the Mobile Purchase Order Inquiry window. * Depending on the eConnect error, we've added quick navigation to the specific Microsoft GP Maintenance window: - If a vendor item number has been added to a purchase order in MobileTech, but the vendor item does not exist in Signature, when you select the eConnect error, the message now displays "This item hasn't been assigned a vendor item number. Do you want to assign a vendor item number?" If you select Yes, the Vendor Maintenance window opens with the vendor item number auto populated in the window. If you select No, you are returned to the Mobile Purchase Order Inquiry window. - If a site has been assigned to an item in MobileTech but is not assigned in Signature, when you select the eConnect error, the message now displays "This site is not assigned to the selected item. Do you want to assign this site?" If you select Add, the Item Quantities Maintenance window opens with the item number, and the site ID auto populated. * You can now zoom on the following fields while focused on the purchase order row: - eConnect Error: Select the eConnect error in the purchase order row to open a pop-up window to view the error message. - Item Number: Select the Item Maintenance header to open the Item Maintenance window to view the item number information. - Service Call or Job Number: Select the Service Call/Job Number header to open the Service Call or Job Maintenance window to view the information. - Technician: Select the Technician header to open the Technician Lookup window to view the technician information. - Vendor: Select the Vendor header to open the Vendor Maintenance window to view the vendor information. * We've added a TRX_Origin column to the WS20003 and WS30003 tables with possible values of	2018 R7

Enhancement	Description	Version
Updates to Mass Contract Renewal Window	We've updated the Mass Contract Renewal window with the following: * After tabbing off the filter fields, the contracts now display automatically in the scrolling window. Previously, you had to select the Preview button to display the filtered results. The Preview button is still available, but you no longer have to select this. * You can now filter by contract type. * We've added a Clear button to clear the entered filter criteria. * We've added the customer name to display in the Customer Range section. * Master contracts are now grouped together, although still on separate lines, to make it easier to see the contracts that are on a master contract. * We've added a Contract Type column to the scrolling window. * We've added Contract Type to the Contract Mass Renewal Report.	2018 R7
Within the Create Service Invoices Window add a Description to Service Call	In the Create Service Invoices window, you can now add a description to a service call. This window is accessed from the Service Batch Invoicing window when you select the Next button from the Service Batch Invoicing window. In the service call scrolling window, you can right-click on the service call and select Edit Description or you can select the Note icon to the right of the service call ID to open the Description window. After adding the text, select OK . If a service call has a description added from this window, the Note icon displays as yellow with lines	2018 R7
Service Batch Invoicing - Filter By Service Area	In the Service Batch Invoicing window, we've added the ability to filter by service area when displaying invoices to add to the service batch.	2018 R7
Access Contact Management via GoTo button on nav toolbar	From the Service Manager window, we have added Contact Management which can be accessed by selecting the GoTo button from the navigation ribbon. The Contact Management window display is filtered to the customer and location selected in Service Manager customer. You can add new contacts or edit existing contacts for that location.	2018 R7
Salespad Integration - stored proc		
Initiate service call from Equipment Master/Component	Users can now initiate a new service call from the Equipment Master window and/or the Equipment Component window for an existing equipment record by selecting New Call from the menu bar.	2018 R6
Customer class field added to Quick Add	The Customer Class field has been added to the Add Service Customer (Customer Quick Add) window accessed from the Service Manager window.	2018 R6

Enhancement	Description	Version
Service history accessible on master contract window	A new Master Contract Service History window can be accessed from the Master Contract window by selecting the new Service History button. This window displays the service call history for all contracts on the master contract.	2018 R6
Reconcile process report	The Reconcile process for Cost, Billing, and/or Revenue now prints a report for each process that displays the BEFORE and AFTER totals, as well as any changed items, are indicated with an asterisk.	2018 R6
Prompt when adding equipment not on maintenance contract to (MC) service call.	If a user attempts to add a piece of equipment that is not covered by the contract to a Maintenance Contract (MC) service call, a message similar to the following display: "Equipment ID xxxx is not covered by Contract xxxx. Do you still wish to use the equipment?"	2018 R6
Call roll forward update	In Service Management Setup Options, use the Call Roll Forward Start Time field to enter the start time for appointments that are rolled forward. If you do not enter a start time, 12:00 AM is the default start time for rolled forward appointments.	2018 R6
Copying equipment records confirmation	When copying equipment from the Equipment Master window, a message now displays "Are you sure you want to copy this equipment?" to indicate that the copy process will occur. Previously, it was reported that users were clicking the Copy button more than once as nothing displayed to show that the equipment was copied, which then created more than one duplicate piece of equipment.	2018 R6
Alternate report: Inventory Adjustments Edit List	Added a new alternate GP report called Inventory *Adjustments Edit List* that includes the job and cost code or service call and cost category information.	2018 R6
Added World Icon to address field	The World icon has been added to the right of the Address ID field in the Location window. Selecting the icon opens the Internet Information window where you can enter internet-related information that you want to track for the Address ID.	2018 R6
Updated estimate labor and forecast labor hour fields	Updated the Estimate Labor Hours (1-5) and Forecast Labor Hours (1-5) fields' data types, which allows for 6 digits plus 2 decimal places to allow for a keyable amount up to 999,999.99. The total fields were resized to display the maximum values.	2018 R6
Technician lat/long obtained from Resco audit records	A technician's latitude and longitude coordinates are now being obtained from Resco audit records when the appointment status is changed.	2018 R6
Journal entry cancel option	When correcting a journal entry, users now have the option to terminate the entire process by selecting the Cancel button in the message that displays the closed service call ID that will be reopened.	2018 R6
PO line status update	Users can use the PO line status of 6 with wsiWSCreateUpdatePurchaseOrderIntegration to cancel existing purchase order lines.	2018 R6

Enhancement	Description	Version
Call Type added to deletion history table	Call Type has been added to the service call deletion history table. You can add this to a SmartList to track deleted service calls by call type.	2018 R6
Updated Signature Registration process	The Signature Registration app will now function on a Secure Sockets Layer (SSL) and allows the use of HTTPS. This is compatible with TLS 1.2 Protocols.	2018 R6
Maintenance invoicing preview updates	The Maintenance Invoicing window has a new Include Non-Auto Billed Contracts in Preview option that provides the ability to include non-auto billed contracts on the SV_PM_Invoice_Preview report.	2018 R6
Time Zone Data Utility update	The Time Zone Data Utility has been updated to allow any member of DYNGRP to execute the branch, location, and technician time zone values as well as the service data.	2018 R6
Mobile Inventory Inquiry window update	Added the Technician column to the Mobile Inventory Inquiry window.	2018 R6
Save prompt for location window	Users are now prompted to save the Location window if they attempt to close the window without saving.	2018 R6
Updated SQL stored procedure for Service appointments	In the SQL stored procedure SMS_Update_Appointment, we've added the modified date, modified time, and modified user fields to the update statement. When an appointment is updated in MobileTech, these fields will be populated.	2018 R6
Updated Maintenance Contract window	The Maintenance Contract window is now brought to the forefront when adding the contract to the Master Contract from the Assign Contract window.	2018 R6
Maintenance contract renew button update	The Renew button is now disabled in the Maintenance Contract window when the contract is assigned to a master contract and the billing control is set up by the master contract.	2018 R6
Telephone number format update	Users can now edit the telephone number format for the Service Contact Management window by editing the PhoneFormatSetting line in the Dex.ini file.	2018 R6
Updates to inactive customers and locations	Added logic within Service Management to limit certain activities completed on an inactive customer and/or service address (Location). On the Service Manager, Location, and Maintenance Contract windows, a display-only Inactive check box has been added to the right of the Location Address ID field that is marked to indicate an inactive location. A Customer ID Inactive check box was also added to the Maintenance Contract window.	2018 R6
Updated contract reports	We've updated the Mass Contract Renew Exception Report and the Master Contract Renew Exception Report to show the customer and/or location inactive status.	2018 R6
SQL job for rolling calls forward	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.	2018 R5

Enhancement	Description	Version
Manufacturer ID of Unknown added	An UNKNOWN manufacturer 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.	2018 R5
Reopen manually closed calls and pull back costs	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.	2018 R5
Reconcile Maintenance Contracts	Users can now reconcile costs, billing, and revenue from the Contract Revenue/Costs window. The Reconcile feature can be password protected in the Password Setup window. Reconcile Options: - 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.	2018 R5
Service Manager Notes update	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.	2018 R5
Disable Field Invoicing checkbox on Customer Maintenance window	We've added a Disable Field Invoicing checkbox to the Service Management Customer Maintenance window 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.	2018 R5
Equipment description and type added to windows	We've added Equipment Description and Equipment Type display-only fields to the Contract Task Maintenance and Service Call Task Codes windows.	2018 R5
Progress billing on Quote leaves call open	When posting a progress billing invoice from a service call with a Fixed Quote, the service call remains open for future/final billings.	2018 R5
Added the ability to escalate Annual contracts	Added the ability to escalate Annual contracts. Escalating an Annual contract only updates the Renewal Value. The remaining values (Escalated Billing and Costs) are updated during the maintenance contract renewal process.	2018 R4

Enhancement	Description	Version
Added primary keys to all WSDOC tables that previously did not have them	We've added primary keys to all WSDOC tables that previously did not have them.	2018 R4
Added the ability to save an appointment with conflicts on the double-booking message window	If you have created an appointment that has a conflict with another appointment, a message window pops up with the existing choices of Yes to open the Conflict Resolution window, No to return to the Appointment window to make changes to the appointment, and now has a Continue button that saves the double-booked appointment. (Users will only see this if they have Allow double-booking turned on.)	2018 R4
Only show open years in the Recognize Revenue and Maintenance Tasking windows	We've cleaned up the Years displayed in the drop-down fields to only show the open years on the Recognized Revenue window and the Maintenance Tasking window.	2018 R4
Contact Management has been enhanced for improved usability	Depending on your Contact Management settings, you can now show and auto-create contacts on the Service Call window. Use the new Service Contact Management window to search for existing contacts. Use the New Contact button on this window to open the Contact Setup window.	2018 R4
Updated Workorder reports 1-5 to include Caller Name, Email Address, and Phone Number	Updated Workorder reports 1-5 to include Caller Name, Email Address, and Phone Number	2018 R4
Add-on-the-fly functionality has been 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 long be able to add Jobs and/or Job Cost Codes via the Transfer to Jobs window.	2018 R4
Added the ability to map Service cost transactions to a Job cost code in the Transfer to Job window	Users now have the ability to map Service Call cost transactions to a Job cost code utilizing a new Transaction Mapping window. Use of transaction level mapping is optional and can be used in conjunction with the existing cost code level mapping functionality.	2018 R4
Added the ability to map Service Cost Category transactions to Job Cost Codes	The existing Transfer to Job feature has been updated so that users have the option to map transactions within a Service Cost Category individually to Job Cost Codes. The new Transaction Mapping window is accessed by clicking on the blue arrow icon that is next to each Cost Category in the Transfer Service Costs To Job window. You are required to map all the transactions within a specific cost category.	2018 R4

Enhancement	Description	Version
SSRS Reports	The following reports have been updated to include new or updated features in MobileTech 7.0. Service Management Reports: - Service Invoice Summary.rdl – New report for the Service Batch Invoicing feature. - Appointment Summary.rdl – Updated the customer and technician signature display. - Call Summary.rdl – Updated the customer and technician signature display. - Field Invoice.rdl – Updated the customer and technician signature display. - Job Appointment Summary.rdl Added the customer and technician signatures. Added the new Job Resolution Note. (Signature 2018 R3 and higher) TimeTrack Reports: - Time Sheet.rdl – Updated the technician signature	2018 R3
Mobile Contacts	MobileTech 7.0 introduces the opportunity to synchronize the contacts that technicians add or update in the MobileTech Client with Signature 2018 R3 (and higher)if you have the Contact Management module. The new Mobile Contacts window (Inquiry > Service Management) lets Service Management users review and process the customer's contact information provided by MobileTech users.	2018 R3
Service Batch Invoicing	The new Service Batch Invoicing window allows Service Management users to create and print service invoices for completed service calls without going into the Service Call window. The Service Batch Invoicing window is our new invoicing wizard. The first window in the wizard allows the user to select the service calls to be invoiced, then the second window of the wizard provides the means for the user to filter out transactions to omit from the invoicing process. The user can elect to exclude transactions by cost category and/or drill into the transactions of any service call to further tailor the transactions to be invoiced. After finalizing the transactions to be invoiced, the user will generate an edit list then create invoices in a batch. The user can print the invoices or return to page 1 of the wizard to resume invoicing additional service calls.	2018 R3
Updates for new EPA requirements for refrigerant tracking	New Fields: Refrigeration Equipment Type, Maximum Leak Rate, Current Leak Rate Updated Windows: Equipment Master Additional Tab, Refrigerant Tracking Updated Reports: Refrigerant Tracking, Refrigerant Tracking List New Report: Refrigerant Tracking Leak Analysis	2018 R2
Call Summary report	We enhanced the Call Summary report to include Refrigerant Tracking information.	2018

Enhancement	Description	Version
SSRS Reports	SSRS Call Summary Report and SSRS Appointment Summary reports have been updated to conditionally print refrigerant tracking information if there are refrigerant tracking records associated with the call.	2016 R3
Set any task response as required	Users are now able to set any task response as required so customers can update their task codes prior to the release of MobileTech 6.0. This setting is for use with MobileTech 6.0 and higher and has no impact on the Service Management tasking functionality.	2016 R3
Email capabilities for Purchase Orders	We've added the ability to email a purchase order to a vendor from the Signature Purchase Order window, an alternate Dynamics window. You can set this up individually for each vendor or you can assign email settings to multiple vendors.	2016 R2
Service Call Status window	Like Job Cost's Job Status window, we've added a new Service Call Status window that allows users to view unposted, committed and actual costs associated to a service call, as well as anticipated billable information. Accumulated costs from all invoices for the service call are displayed. Margin information is also shown, although tax information is not included. The Service Call Status window provides zoom capability to the cost categories and cost transactions for the service call.	2016 R2
Service Call Lookup by Customer window	Users can now filter the service calls displayed in the Service Call Lookup by technician.	2016 R2
Expansion Go To button	In the Service Call Inquiry window, an expansion button has been added next to the Service Call field that opens the new Service Call Status window. An expansion button is also available in the Service Call Status window that opens the Service Call Inquiry window.	2016 R2
Assignment Status field added to the Technician Reassignment Utility window	The ability to update the appointment status when reassigning service calls and appointments to a different technician has been added in the Technician Mass Reassignment window. The status field is enabled only when source "5. Service Call/Appts (SA)" is selected from the drop down list.	2016 R2
Word templates for Signature service invoices	Predefined service invoice Word templates are now available.	2016 R2
Add Service Customer window	A "Quick Add" customer option has been added to the Additional button on the Service Manager window. This window can be used by limited GP and full GP users to quickly create a new service customer with the essential data needed to create and invoice a service call. We've also added a SmartList that displays the new "quick" service customers so that the full GP user can update the customer record with other pertinent information using the traditional Customer Maintenance window. Users can only create and edit "quick" customer records from this window.	2016 R2

Enhancement	Description	Version
Attachments to Additional Work	MobileTech technicians can now attach files to Additional Work records. The attachments are visible in the Mobile Additional Work Inquiry window. These attachments synchronize to the database as an attachment to the Additional Work record when the Technician syncs data to the server.	2016 R2
Batch Creation windows	We've added new batch entry windows for limited Dynamics GP users. The new batch windows are used in certain Service Management, Job Cost and Equipment Management windows. From the new batch windows, users can only create and/or edit batches.	2016 R2
Signature SmartList Designer Objects.	With Signature 2016, we've added the Signature SmartList Designer Objects. If you currently are using SmartList Builder, we recommend that you continue using the Signature SmartList Builder Objects. The following SmartList Designer objects are available to import: Job Cost: - Job Cost Codes.xml - Job Cost Job Billing.xml - Job Cost Jobs.xml - Job Cost Subcontractors.xml Service Management: - Service Call Source.xml - Service Customer Locations.xml - Service Equipment.xml	2016
Added the Service Call Quote SRS report	This report compiles service call quote information such as costs, billing amounts, and hours, and provides a total of all quote amounts by cost code, along with individual quote totals, profit amounts, and task details including material requirements. This report can be used internally to view profit, or you can filter down to a single quote or customer, hiding internal information such as costs and hours, and print a quote to give to a customer. You can filter this report by customer, location, quote number, or quote expiration date. You can choose whether you want to include estimated and calculated hours, billing amounts (including profit), estimated and calculated costs (including profit) and task details.	2016

Enhancement	Description	Version
Added the ability to assign equipment to buildings in Service Management.	You can either multi-assign equipment to a specific building or you can add a building to the equipment record. The building information is accessed on the service call by using the Equipment lookup and/or drilling into the equipment record. When using the lookup, you can sort by building to quickly find the equipment. You can also drill down to the Equipment record to see the building and room the equipment is assigned to.	2016
For origination tracking purposes, a Service Call Source field has been added to the Service Call Master table (SV00300) and the Service Call Master Archive table (SVA0300).	The integer field values equate to various sources (modules) to help track where Service Calls were generated from. This will be used for troubleshooting and reporting purposes for existing modules.	2016
Added the recalculation ability for Labor Rate Group on the service invoice.	Added the recalculation ability for Labor Rate Group on the service invoice.	2016
Extended pricing and manually added/edited billing amounts	If the Bill to Customer ID, Address ID, Labor Rate Group, and/or Price Matrix fields are changed in the Service Invoice window, the Service Invoice window will recalculate all billing amounts fields except for Sales (SOP), Purchase Invoice Entry, Receivings Transaction Entry, and Travel Transactions. Any manually updated amounts will be recalculated. - If the Price Matrix is changed in the Billing Amounts window, which is only available if you do not have Multicurrency registered, the Service Invoice window will recalculate all billing amounts fields except for Sales (SOP), Purchase Invoice Entry, Receivings Transaction Entry, and Travel Transactions. Any manually updated amounts will be recalculated. - If a new cost is added to the invoice, and the Bill to Customer ID, Address ID, Labor Rate Group, and/or Pricing Matrix fields are NOT changed, all manually updated amounts will remain. Prior to Signature 2016, manual updates were recalculated when a new cost was added after the manual changes were made.	2016

Enhancement	Description	Version
HTML 5.0 Web Client compatibility	Signature 2016 introduces HTML 5.0 Web Client compatibility which will render Service Management, Job Cost, and Equipment Management forms as HTML5 web pages. The Web Client delivers only the top, visual interface to the device, while computing is still done at the server level. The Web Client offers support for: - **Multi-browsers** - Any browser that supports HTML 5 such as Internet Explorer, Edge, Chrome, Firefox, and Safari. - **Multi-device** - Any device that supports HTML5 web browsers such as Android, iOS, and Windows. *Note: When using the Web Client, file attachments can only be viewed from and copied to the Microsoft SQL Database.*	2016
Task Based Expense Accounts	Provides the ability to set up costs for unbilled tasks to post to an expense account The account is pulled from the task rather than the cost of goods sold account assigned to the division. This new functionality is for standard service calls only.	2013 R3
Task based Account Expense Allocation	Provides the ability to allocate costs to a task within a service call to enable better tracking of your costs. This new functionality is for maintenance and standard service calls. (Not available on MobileTech)	2013 R3
Task List Hierarchy	The ability to create hierarchical structured task lists has been added. Each task list will still be comprised of tasks and subtasks, but instead of simply ordering the tasks within a task list, you have the option to hierarchically order them as well as have levels within the tasks.	2013 R3
Multiple Task Response	The ability to record multiple drop down text, numeric or yes/no responses for an individual task.	2013 R3
Service Call Task Window changes	Added to the window: Originating Call ID – The ability to reference an existing service call while creating a new service call. (Associated Service Call) Job Number - The ability to reference a job number on a service call.	2013 R3
SOP Warranty Invoices	The warranty invoice type can be used with transfers of quotes or orders in Sales Order Processing. An account or account segment can be substituted on the Warranty Parts setup window to be used during a transfer.	2013 R3
Invoice options setup window	An option that controls what is included when you create an invoice and unposted or committed costs exist.	2013 R3
Invoice view	A new column has been added to the invoice view with drill down functionality. Users will not have the ability to close a call if unposted costs remain on the invoice	2013 R3

Enhancement	Description	Version
Inspection Report	This report displays the vehicle reading data that is entered either in the Vehicle Readings window or from Mobile Tech. You can also print out the Inspection report if no data has been entered so that you can manually complete the inspection on the paper.	2013 R3
Synchronizing equipment locations	Provides the ability to automatically synchronize equipment records between Equipment Management and Service Management.	2013 R3
Service Call Task Code Attachment	Provides the ability to add attachments to task codes from the Task Code Setup window and the Service Task Code window in Service Management and MobileTech. The attachments can be viewed in either window in addition to the service call.	2013 R3
SSRS reports	The following SQL Server Reporting Services (SSRS) reports have been added or enhanced: - Certified Payroll for Public Works (New) - Annualized Labor Loading report (New) - JC PM Aged Trial Balance (New) - SRS Grouped Invoice (New) - Historical Aged Trial Balance - Service Call Cost Audit	2013 R2
Contract Management Renewal Value	A Renewal Value field is added to the Contract Maintenance window, which provides the flexibility for the user to set, in advance the value of the maintenance contract to be used in the next renewal period. In addition credit memos are no longer carried over into the new contract year during the renewal process.	2013 R2
Service Manager window	View the last ‘X’ number of service calls on the Service Manager window. This allows you to easily find information about the most recent service calls for a specific customer location or contract.	2013
Service Call Lookup by Customer window	When using the Service Call History button on the Service Manager window, the Service Call Lookup window stays open after you select a service call to view on the Service Manager window. You do not need to reopen the lookup window to view a different service call.	2013
Pricing matrix enhancements	Set an option to populate the pricing matrix and labor rate group onto a service call from the service call Location record. Previously, these values would populate from the Bill To Location record. Additionally, the billable amounts for business/travel expenses in TimeTrack will now be calculated automatically based on the extended pricing matrix assigned to the service call.	2013

Enhancement	Description	Version
Refrigerant Tracking enhancements	If you are using Refrigerant Tracking, you can set up refrigerant types, leak locations, and refrigerant codes to save data-entry time. The Refrigerant Tracking window has new fields for identifying the cylinder and circuit where a leak has occurred. The new Refrigerant Tracking List report allows you to view a printable list of refrigerant tracking records by customer, location and/or equipment ID	2013
SSRS reports	The following new SQL Server Reporting Services (SSRS) reports are available for Service Management. - Service Call Gross Profit - Contract Equipment PM Tasks - Service Call Analysis - Unbilled Quote - Service Call Analysis - Unbilled Time & Materials (T&M) - Sales Tax - Material Purchases - Service Revenue Recap - Service Profitability Report	2013
Resolution description	The resolution code Description field holds 255 characters. This is useful for MobileTech users who want to work with a resolution description that is longer than the previous 30-character limit.	2013
Work in Progress (WIP) Enhancements	Manage Work in Progress (WIP) and Cost of Goods Sold (COGS) by delivering more relevant and timely financial reporting; adding automation in Service Management to generate reversing journal entries when required by the change of a division or call type on a service call.	2010 R3
WIP Account Reconciliation Tool	Allows you to compare your Job Cost and Service Management WIP sub-ledgers to the General Ledger; sorting and filtering functionality enables you to easily identify the discrepancies that are causing an imbalance in your WIP accounts.	2010 R3
Work in Progress (WIP) Enhancements	Manage Work in Progress (WIP) and Cost of Goods Sold (COGS) by delivering more relevant and timely financial reporting; adding automation in Service Management to generate reversing journal entries when required by the change of a division or call type on a service call.	2010 R3
Service Call cost integration to a job	Provides an automated process to move cost and billable amounts from a work order to a cost code on a job. A link from the cost code will take you directly to the work order for reference of the work completed.	2010 R2
Mass Close/Complete of Service Calls	This feature provides an automated process to complete/close service calls with the ability to mark multiple calls.	2010 R2
Multiple open invoices per service call	This feature allows more than one open invoice for a Service Call and provides the ability to do progress billing of an extended service call.	2010 R2

Enhancement	Description	Version
Invoice Grouping	This feature provides the ability to combine multiple service calls into one invoice and select which invoices to bill.	2010 R2
Refrigerant Tracking	This feature provides the ability to track refrigerant usage by equipment and satisfies requirements for government reporting.	2010 R2
Service Request Extender	This feature provides integration with a Service Aggregator who provides facility managers with a single platform to procure, manage and pay for facility maintenance services from their own network of contractors.	2010 R2
Excel Tasking Utility	This feature provides the ability to import a maintenance quote task via an Excel template to setup a maintenance contract.	2010 R2
Service Management Move Equipment and Move Location updates Equipment Management Link	This feature provides the ability to keep the equipment link from Service Management and Equipment Management updated to the correct customer/location/equipment. This keeps the link in sync and helps to avoid orphan records.	2010 R2
Shift Premium	Automatically calculates the additional pay amount for a shift, versus having multiple pay rates. This feature is an extension of the Microsoft Dynamics GP 2010 feature, which allows you to include additional pay amount to an hourly wage for employees as incentive for working outside the regular day shift, such as second shift or third shift. When entering a payroll transaction, the shift premium will default automatically based on the shift code that is assigned to the employee’s pay code. Depending on what application you are using to enter labor transactions, the shift code can be edited per transaction.	2010
Service Call Inquiry Zooms	Read only views of service calls. New Service Call Inquiry allows read only view of Service Call, Call Tasks, Task Materials, Appointments, Invoices, Historical Invoices, Credit Memos and Notes. This enables better information availability to users without the risk of accidentally changing the data.	2010
Service Equipment Testing	Equipment Testing Window - You can now keep track of tests that are performed on service equipment, including the test date, test results, and the technician who performed the test. You can also enter the next scheduled test date for a regular or recurring test, as well as set user-defined equipment information to default from a previous test to save data entry time.	2010

Enhancement	Description	Version
Reimburse Expenses thru AP for TimeTrack	Eliminate having to cut multiple checks or additional payroll steps to reimburse expenses to a technician. For companies that pay their technicians for expenses through Accounts Payable rather than Payroll, this feature will enable this to happen. For the technician, nothing changes. They process their time and expenses through MobileTech or TimeTrack as they currently do. When TimeTrack is processed, if this setup option is checked, the expense elements will be processed to AP for both Service Management and Job Cost transactions.	2010
SQL Server Reporting Services (SSRS) Report Templates	Streamline reporting efficiency with templates for building out SSRS reports which can be tailored for your organization. These report templates can work with any view or table and provide an easy way to make basic reports and charts. This allows a technical resource to build and modify the templates in Report Builder (free with SQL Server Reporting Services).	2010
Prevailing Wage	The payroll entry resource will no longer need to remember this data and the system will automatically make the changes necessary when time cards are processed. Accommodates several prevailing wage and benefit scenarios, including the following: prevailing wage is higher than employee standard wage, employee standard wage is higher than prevailing wage, prevailing fringe is higher than employee standard fringe employee standard fringe, is higher than prevailing fringe. In addition, you can run a Certified Payroll report (SRS version), which has been modified to address the Davis-Bacon Act (DBA) wage determinations.	10.0 EX FP2
Support landed cost on PO return documents	Landed Cost is a cost that is typically associated with costs of an internationally shipped item including freight, duties, taxes and storage charges. This enhancement allows for a reversal of landed cost when processing a returns transaction by retrieving the amount of the landed cost that originally posted to the service call or job.	10.0 EX FP2
Canadian handling of GST and PST taxes on PO documents	In Canada, the GST is often recoverable via input credits and therefore not technically a cost to the job or service call. This feature will allow a user to specify which tax details hit the job and WIP account as costs to the job and which go directly to the GL.	10.0 EX FP2

Enhancement	Description	Version
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Automatic Item Creation	Future ordering of a new item made easier from the catalog. When entering a new item in Purchase Order processing (POP) or Sales Order Processing (SOP) and the item ID is not already in the Item Master but resides in the manufacturer/vendor catalog table, you are able to select the item and create the item Master Card. This is for the GP SOP/POP windows only, and will not be available when using the Service Management SOP/POP windows for these types of transactions.	10.0 EX FP2
Automatic Percentage Overhead/ Miscellaneous Charges	To account for miscellaneous service expenses like shop supplies, fees, and non-inventoried items such as nuts and bolts, you may choose to set up a “billable overhead” charge, to be added automatically to your service invoices. This charge is calculated as a percentage of the total cost or billing amount for a cost category, with set minimum and maximum amounts. Setting up this automatic charge is useful in helping to eliminate user error, as it assures that billable overhead is being applied on a consistent basis. You can set up multiple charges in your pricing matrixes, which are then assigned to customer locations; this allows you to associate different charges.	10.0 EX FP2
Canadian handling of GST and PST taxes on PO documents	In Canada, the GST is often recoverable via input credits and therefore not technically a cost to the job or service call. This feature will allow a user to specify which tax details hit the job and WIP account as costs to the job and which go directly to the GL.	10.0 EX FP2
Support over-scale employee pay rates	Compare employee home rate class, employee-specific pay rate in Payroll setup and user-entered rate class. Optionally, users can take the greatest of the 3 with allowable override at entry.	10.0 EX FP1

Enhancement	Description	Version
Maintenance Contract Header Beginning Balance Input Validation	This allows users to create a SQL stored procedure solution that validates contract header information and allows a developer to supply a year-to-date and contract-to-date beginning balance for revenue recognized and billing.	10.0 EX FP1
Paging Enhancements	Newer technology has been implemented to update email paging to use DB Mail instead of SQL Mail and allow paging to multiple technicians and teams. Additional configurability for data from additional fields to be added to pages has been introduced as well. Users now have the ability to broadcast planned maintenance calls to Mobile users during call generation.	10.0 EX FP1
Service Call Inquiry Zooms	New Service Call Inquiry allows read only view of Service Call, Call Tasks, Task Materials, Appointments, Invoices, Historical Invoices, Credit Memos and Notes. This enables better information availability to users without the risk of accidentally changing the data.	10.0 EX FP1
Transaction Entry Import Validation	SQL stored procedure for WennSoft GL transactions that performs validation and write simultaneously to the WennSoft Transaction Entry window and the GL. This is a useful tool for building solutions to import Job and Service Call/Contract beginning cost balances or importing from other systems.	10.0 EX FP1
Microsoft SQL Server Reporting Services	Contains a set of Microsoft SQL Server Reporting Services reports. These reports can be printed in a variety of formats, provide better access to your data and can be easily modified to satisfy your specific needs. Examples of these reports include invoices, service work orders and new service contract reports.	10.0 EX FP1
Display Job Number / Service Call on Inventory Transaction Zoom	Provides users with the ability to drill from GL to Job Status or Service Call, delivering a tighter integration between WennSoft and GP Financials.	10.0 EX
Job/Service Appointment Scheduling Enhancements	Allow for scheduling of appointments for both jobs and service calls through a single scheduling engine. Support for job appointments in Graphical Schedule Board and MobileTech are an increasing requirement for technical organizations who share the same labor resources across both jobs and service calls.	10.0 EX

Enhancement	Description	Version
Rate Class Enhancements	Rate Class union reports include service call transactions and unbilled transactions. Rate class drives and captures benefit and deduction amounts by transaction, including Service and Unbilled (requires rate class and union code). New benefit calculation methods of % of Net Wages, % of Gross Wages, % of ded action, % of earnings wages. Multiple unions in a rate class and same union in multiple rate classes (same union may use different rates depending on type of work such as Heavy Commercial vs. Light Commercial). Benefits and Deductions which are not set up in Rate Class, still calculate if assigned to employee. This is useful for employee specific items such as fixed amount garnishments. If a benefit has reached a threshold in a prior pay run then the system will not include it in a run.	10.0 EX
Inventory Transaction Zoom	Display Job Number / Service Call on Inventory Transaction Zoom – provides the user with the ability to drill from GL to Job Status or Service Card – delivering a tighter integration between WennSoft and the Financials.	10.0 EX
Call Roll Forward	A modification to the call roll forward process allows users to include or exclude appointments by appointment status, allowing dispatch staff to automatically roll the appropriate calls.	10.0 EX
Contract Billing Schedule	This feature will allow users to update the contract amount from the billing schedule windows.	10.0 EX
Contract Spend Plan	This feature will allow the entry of estimated costs by date for each cost code estimate amount (for labor estimates, hours per date range). “Zooms” will open a new window where the user can enter multiple dates and estimated cost amounts per date. Reports showing actual versus estimated costs and billed amount will allow organizations to more accurately analyze contract profitability.	10.0 EX
Contracts for Revenue Schedule	To ensure audit compliance, users can no longer close or renew a contract until all billed revenue has been recognized. Contract revenue doesn’t have to be 100% recognized (matching contract total), but the amount of revenue recognized can’t be less than the total billed to date.	10.0 EX
Master Contract Start/End Date	Contracts that are a part of a master contract, can now be controlled by the master contract date range. During the renewal of the master contract (assuming the master contract controls billing), all contracts under the master contract will renew and align with the dates on the master contract. If the master contract is not controlling billing, the length of the contract remains unmodified.	10.0 EX
Material/Items per Task Code	Users have the ability to define the materials and items that are required to complete a specific task. Additionally, technicians will be able to print a report showing all materials and items they will need before beginning the service call.	10.0 EX

Enhancement	Description	Version
Extended Price Matrix	An extended price matrix will allow organizations to automatically add a flat rate amount to a service call. The mark-up amount can be based on the value of the equipment, manufacturer, model, serial number, call type or problem type and can be configured by percent, flat amount or fixed price.	10.0 EX
Renewal Contract Numbers	A contract must be left open when there are costs that haven't posted, but the contract must be renewed in order to generate tasks for the month after the original contract expires. This feature will allow a contract number to be opened more than once as well as allow users to associate a single piece of equipment to more than one contract.	10.0 EX
Revenue Recognition Schedule Window	The Revenue Recognition Schedule window will be editable, allowing users to add records to fiscal periods and create an invoice or a credit memo. This will enable organizations to recognize revenue multiple times per fiscal period. The ability to create a credit memo will eliminate the need to manually create a General Ledger adjustment.	10.0 EX
Service Invoice Unposted Cost Lookup	This feature will allow users to see the unposted costs assigned to a service invoice and zoom to the transactions.	10.0 EX
Simplified reporting	Allows users to easily preview and print reports from within the application using a new common printing DLL.	10.0b01
Alternate General Ledger Entry Window	Using journal entry, users can transfer costs from a service call to a job and vice versa, add costs to a job or service call or move costs from one service call to another. In addition, users can enter costs to many service calls/jobs on the same journal entry. When multi-currency and inter-company General Ledger transactions are posted, jobs and/or service calls are updated.	9.0
Additional Setup Windows	This addition provides users with additional setup options for both Job Cost and Service Management.	9.0
Enhanced Time Zone Functionality	Users can view specific service date/time data in the time zone of the location, technician or user, which helps dispatchers who dispatch across multiple time zones.	9.0
Government Service Request	Citizens or entity employees can enter requests for service via web form. These printable forms are viewed within Service Management and used to generate a new service call. Additionally, the citizen or entity employee can be notified of the status of the request manually or via automated e-mail.	9.0

Enhancement	Description	Version
Maintenance Contract enhancements	Different contract icons are displayed depending on the status of the contract(s) for the selected location. Users can also view the contracts and their status. For service calls involving equipment repair or replacement, contract IDs for equipment covered by a service contract will automatically be added to the Service Call window and the call type will be changed to Manual Contract. Six- and 12-year task frequencies are now available. Invoice names can be assigned to predefined maintenance invoice formats.	9.0
Post for Payroll	Service Management will be updated by a WennSoft batch posting process, improving the process for non-Microsoft Dynamics GP payroll users. After TimeTrack transactions are committed, non-Microsoft Dynamics GP Payroll users can post the cost and overhead batches to Service Management, allowing the user to control the posting date of both batches. At that time, the service payroll transactions will be automatically removed from payroll or maintained for payroll’s use, depending upon the Service Management payroll posting options.	9.0
Salesperson Mass Reassignment	Users can reassign salespeople to customers, customer addresses, service locations and contracts in mass and with increased flexibility.	9.0
Service Call Import	Users can import a service call record from a text file or spreadsheet, creating default appointments and updating the service call log with new service call information.	9.0
Service Call User Defined Field 2 Validation:	Users have more control over data stored in service call user-defined fields.	9.0
User Defined Field Table	The ability to create and store unlimited user-defined fields of data within service calls allows users to perform a wide range of calculations, displaying data from different databases.	9.0
Additional Sub Cost Codes	Unlimited user-defined sub cost codes will allow organizations to further categorize costs. Sub cost codes will have their own tax schedule and their own posting accounts and will work like normal service cost codes.	9.0

WennSoft	Schedule ***Supported Versions: 2025 and 2024***	
Enhancement	**Description**	**Version**
Customer Hub Updates	1. The sublocation field is now validated with Signature if you have Use Validation for Sublocations marked in the Service Management Service Options window. 2. When creating a service call from the Customer Hub, the New Service Call window now displays in the Customer Hub. Previously users had to click the Schedule tab to access this window.	**2025**
Refrigerant Tracking Compliance Updates	Refrigerant tracking has been updated to comply with the American Innovation and Manufacturing (AIM) Act's 2026 reporting requirements. The AIM Act brings major changes to refrigerant management. Businesses must meet new regulatory requirements for tracking, reporting, and leak detection by January 1, 2026.	**2025**
Service Calls can be created from the Schedule Board	You can now add a new service call from the Schedule Board when you right-click on an appointment, resource activity, or an empty time cell. (Previously, you could only right-click on an appointment on the Schedule Board.) On the Unscheduled Grid, the new service call option displays for a service or job appointment.	**2025**
Description fields greater than 30 characters creates a note	If a service call or appointment description field exceeds 30 characters, a note is created that contains the entire description.	**2025**
Job Appointment Update	Users can only create job appointments for active jobs.	**2025**
Five Appointment Improvements	1. Capture Priority when Using the Appointment Wizard Description: Adds 'Priority' to the appointment wizard screen. 2. Search for a Resource from the Service Appointment Window More Easily Description: Quickly find a resource using search in the resource dropdown field. 3. Save Changes Made in Service Call Forms and in Appointment Forms Description: Conveniently save changes made to service calls and appointments from the Schedule grid. 4. View Appointment Creation Dates in the Unscheduled Grid Description: In the unscheduled grid, users can now see the appointment's created date. 5. Prevent new service calls from being created for on hold customers in Signature and Schedule. Description: Full support for stoplight statues and for on hold status in Schedule. This now works the same in Schedule as in Signature..	2024

Enhancement	Description	Version
Make appointment status changes more visible to techs and customers	Send SMS Notifications to Technicians and Customers Description: You can now set up an action to send a text message (SMS) notification when an event has been triggered. For example, if an appointment has changed for a technician, the technician receives a text message immediately. Note: Text size limit is no longer limited to 160 characters. Note: In the Signature 2023 release, we enhanced text messaging to send true SMS messages via the Amazon SNS (Simple Notification Service).	2024
Two Dispatching Improvements	1. Disallow New Maintenance Service Calls for Inactive Locations Description: A new setup option in Schedule allows hiding the option to create a 'New Service Call (MC Only) for Inactive Location'. 2. Set Default Hours when Creating a New Service Call or Appointment Description: Set a default value in the new call estimate hours field and new appointment estimate hours field to appear when the window is opened. Default hours appear but can be changed by the user.	2024
Six Ways to Make Important Information More Accessible to Dispatchers	1. View Customer and Location Notes Description: Schedule users can now view customer maintenance card and customer location card notes directly in Schedule. 2. View Technician Phone Numbers on the Schedule Board Description: Enables dispatchers to quickly lookup a technician's phone number directly in the Schedule board. 3. Exclude Bill To Only Addresses in Customer Hub Description: Show bill to only locations excluding bill to only addresses by default in the customer hub. 4. View Service Call Notes More Easily Description: Quickly open the service call notes window (from the Schedule Board, Unassigned/Unscheduled Grid or Customer Hub Open Appointments Grid) to view service call notes. If there are no notes, a message displays indicating that there isn't a note. 5. Search by Equipment ID in the Customer Hub Description: Easily find equipment in the customer hub by searching for equipment using a partial or full equipment ID. 6. Filter Out Inactive or Retired Equipment Description: Cleans up the clutter by filtering out inactive or retired equipment when selecting equipment to relate to a service call.	2024

Enhancement	Description	Version
Three Performance Improvements	1. Job panel pagination Description: Speeds up job panel load times by loading jobs into the job panel incrementally using pagination. 2. Toggle job panel per user Description: Allows the job panel to be toggleable on a per-user basis. It keeps the company level setting but allows the user to override the setting (in either direction). 3. View all cost codes for a job in job details Description: Provides dispatchers with visibility to all cost codes for a job in Schedule.	2024
Two Routing Improvements	1. Reset Technician Home Address Description: A drop-down menu for route planning allows dispatchers to choose whether to use a tech’s current location or their home location as the starting point for a route. 2. Automatically Reset Tech Starting Locations Description: Automatically resets (per-tech) the techs default starting location.	2024
Three Map Improvements	1. Match Appointment Colors to the Colors of their Assigned Techs on the Dispatch Map Description: Set the color by technician to quickly see which technicians are assigned to an appointment. 2. Map Icons by Call Type Description: Assign different icons in the Schedule map based on call type. 3. Hide Completed Appointments on the Map Description: Cleans up the schedule map to display only open calls by hiding completed appointments.	2024
Meet SLAs More Consistently	1. View SLAs and Related Warning Messages in the Schedule Grid Description: Users can easily glance at appointments in the grid and determine how much time they have left to meet a given appointment’s SLA. 2. Monitor your service level agreements Description: We've taken the Signature Service Monitor and recreated it in Schedule to conveniently track and monitor the statuses of your service call SLAs.	2024
Handle the Depreciation of Bings Maps for Enterprise	Use the Schedule Map with Map Data from Azure Maps Description: Schedule integration with Azure Maps provides an option to replace Bing Maps for Enterprise that is being deprecated.	2024

Enhancement	Description	Version
Invoice Improvements	View Historical Customer Invoice Info in the Customer Hub Description: Quickly find invoice information (Call/Job#, Invoice description, billing amount, etc.) to answer customer invoice questions in the customer hub without having to login to GP.	2024
Set Schedule Visible Hours by User	You can now set Schedule Visible Hours at the user level in each user's User Profile window. If the user level setting is not set up, the company-level setting is used.	2023 (6.0)
Create Service Calls from Contract Row in Customer Hub	Service calls can now be created from the Contract row in the Customer Hub. The New Service Call window (back on the Schedule tab) adds the contract number and the service call type of Maintenance. If needed, you can edit the service call type. The customer's information also auto-populates.	2023
Pre-Defined View Only Role Added	A View Only pre-defined role has been added to the User Roles tab. This role has only View permissions.	2023
Resized Pane Settings Stored in Browser Settings	On the Schedule Board, resized pane settings are now stored in the browser settings. Users won't have to resize the panes every time they log in or if they refresh their browser.	2023
New Setup Option: Show Technician Vendors	We've added a setup option to the Company Settings > Configuration section to include technicians who are also set up as vendors in Signature. The new Show Technician Vendors option defaults to marked, so that technician vendors are included in the resources list. To only show technicians who are not set up as vendors, unmark this checkbox.	2023
Unique PO's in Schedule	When creating purchase orders in Schedule, the purchase order numbers will now be unique to Schedule, similar to how purchase orders are unique from MobileTech. **SCHYYMMDD####** - Prefix = 'SCH' - YY = 2 Digit current year - MM = 2 Digit current month - DD = 2 Digit current day - #### = This number starts fresh every day with "0001".	2023

Enhancement	Description	Version
Update for creating new MC Service Calls	When creating a service call with a call type of MC (maintenance contract), a message now displays when the equipment selected is not covered by a contract. The message "Equipment ID <ID> is not covered by Contract <Contract Number>." has an OK and Cancel button. Selecting OK leaves the selection of the current field (equipment ID or contract number). Selecting Cancel returns the user to the Service Call window with the current field cleared (Equipment ID, Contract, or Call Type). * The message displays in the following scenarios: * The call type is MC, the contract is selected and then the equipment is selected. * The call type is MC, equipment is selected and then the contract is selected. * The contract and equipment are selected and then the call type is changed to MC.	5.0
Changes to Equipment Field	The Equipment field has been transitioned to a lookup field on the New Service Call window and displays only active equipment. Inactive, retired, and group equipment are filtered out of the lookup window.	5.0
Add, Edit, Remove Field Purchase Orders	Users can now add, edit, and/or remove field purchase orders in Schedule. A purchase order that is entered in MobileTech or Schedule must be reviewed, committed, and processed in Service Management and Microsoft Dynamics GP Purchasing before costs that are associated with the purchase order can be processed in the system. We've added new Role Permissions for purchase orders so that you can limit your Schedule users to view, edit, and/or delete. (Administration > User Roles)	5.0
Users set visible hours	Users can now set Schedule Visible Hours at the user level in their User Profile window. If the user-level setting is not set up, the company-level setting is used.	5.0

Enhancement	Description	Version
Default Estimated Hours	You can now set a default value for estimated hours when creating a service appointment and/or service call. The Default Estimated Hours option is set up in Schedule Settings in the Configuration section. When a zero-hour appointment is dragged onto the schedule board, this value defaults for the appointment.	5.0

Enhancement	Description	Version
Add Equipment from Customer Hub	Users can now add and edit equipment and component equipment from the Customer Hub. You can access the new Equipment tab by selecting the customer's service location. Right-click anywhere within the Equipment tab to access the Add Equipment, Edit Equipment, Add Note, View Note, Add Attachment, and/or View Attachment options from the context menu. **On the Equipment tab, you can view the following columns.** Notes - Displays if the note is empty or if a note is attached. Attachments - Displays if no attachment exists or if a file is attached. Equipment ID Description Component Master Equipment ID Component Quantity Contract Equipment Type Manufacturer Model Number Serial Number Barcode Installed By Installed Date Warranty Exp Date Ext Warranty Expiration Date Building ID Building Room Suspended MCC Inactive/Retired User_Defined_1a	5.0
Add customer class to customers	Users can now add the customer class when adding a new customer or editing an existing customer from the Customer Hub.	4.7
Create and modify job notes	Users can now create, view, edit, and/or delete Job (Master) notes from the Customer Hub's Job Detail Panel. Users have access to job notes based on the Role Permissions Settings for Notes.	4.7

Enhancement	Description	Version
Create and modify job attachments	Users can now create, view, edit, and/or delete Job attachments from the Customer Hub's Job Detail Panel. Users have access to job attachments based on the Role Permissions Settings for Attachments.	4.7
Updated Schedule settings	Updated Schedule settings so that for new installations, all form fields (except for user defined) are set to display for Service Calls, Service Appointments, Job Appointments, and Resource Appointments. To remove a field from displaying on the respective form, go to Settings > Company Options > Service Call & Appointment Form Fields and unmarking the appropriate fields. For upgrading customers, the form field selections will not be updated to show all fields.	4.7
Appointment status update	When creating a new service call and entering the technician, start time, and estimated hours, and thereby creating a scheduled appointment, the appointment status is now automatically set to the Scheduled Update status that was set up in Settings > Company Options > Configuration in the Options section. If the value has not been set for the Scheduled Update, then the status will be updated to the Default Status from the Automatic Status Assignment section in the Configuration window. If both the Schedule Update status field and the Default Status field are not set in Schedule Settings, then the "DEFAULT" displays in the scheduled appointment's status field.	4.7
Inactive customer or locations update	Added logic to prevent the ability to create a service call for locations or customers that have been marked inactive in Signature.	4.7
Integration to Building Optimization Broker (BOB)	Schedule is now integrated with the Building Optimization Broker’s Service Request Management module. New role-based security in Schedule administration can enable a Schedule user to view and act upon new Service Requests to either accept or decline those requests. Accepting a request will initiate the new service call form, with information defaulted from the linked Signature customer, location, equipment, and contact (optional).	4.6
Technician Team auto populates in Appointment Wizard	If you have your Resources filtered to only display one Technician Team on the Schedule Resource grid, when you open the Appointment Wizard and select to create appointments for a Technician Team, the Team field will default to the filtered team.	4.6
Default Appointment Status Setting	Users now have the ability in Schedule Configuration to add a default appointment status for manually created new appointments.	4.6
Updated On/Off toggle in Notes window	The On/Off toggle buttons in the Notes window have been updated so that they are more noticeable.	4.6

Enhancement	Description	Version
Geocoding for locations	Geocoding for technician starting locations and service locations has been enhanced to provide greater flexibility in address field selection for geocoding, improved error messaging, and now also provides access to non-administrative users.	4.5
Division added to Job Panel	When using the Job Panel, users can now view and search by the division assigned to a job.	4.5
Required PO functionality	We've updated the Required Purchase Order functionality to check the Bill To Location when the Bill To Location is different than the Service Location. If the Bill To Location has Purchase Order Required marked in Signature, then the Customer PO field is required in the Service Call window for all call types other than MC or MCC.	4.5
Export after search	Users can now export the results after performing a search using the Find feature on the Schedule board and the Customer Hub. When opening the Excel export file, if you are prompted to Enable Editing, select Yes to view all the column headers. Users have the option to select and export one row or export all rows.	4.5
Refresh for Resources section	We've added a Refresh icon to the Resources section on the schedule board that just refreshes the Resource section.	4.5
Added fields for Unscheduled Grid	You can now add the following columns to the Unscheduled grid: - Contract - Contract Sequence - SV Call Source, - SV Call Source Description - Service Call Creation Date	4.5
Bill To label updates	The Service Call window has been updated to change the Bill To labels to display ID instead of Name (Bill Customer ID and Bill Address ID)	4.5
Open Customer Hub from right click on Schedule board	When selecting View Customer Details, View Location Details, or View Bill To Location Details from the right-click menu on an appointment on the schedule board, the Customer Hub opens with the appropriate row highlighted. The View Bill To Location displays if the Bill To Location is different than the Service Location.	4.5
Notify of appointment changes	We've added a Notify column to the Appointment History window. The Notify icon displays if the customer has been notified of the appointment change.	4.5
Service call job lookup updates	In the New Service Call window, the Job lookup icon now opens a Job Lookup window that allows for filtering and sorting as well as having paging and scrolling functionality.	4.5
XOi Deep Linking integration	In Administration Settings, an Integrations tab has been added for setting up the XOi Integration to be used with the XOi Deep Linking feature available in MobileTech 8.0.	4.5

Enhancement	Description	Version
K2A Service Library event log	A K2A Service Library event log has been added to the Windows Event Viewer. Access the Windows Event Viewer to view a log of application and system messages, including errors, information messages, and warnings that may have occurred with the K2A Service Library.	4.5
Added map view in Location tab	A map view has been added to the Location tab in the Customer Hub. The map is displayed if you have enabled and set up the mapping option in Schedule Settings and if you've entered the latitude and longitude information in the Location window in Signature.	4.0.24
Option to create new call in context menu	We've added a new option on the context menu when you right-click a service appointment to create a new service call for that specific customer and location. This is available on the Schedule Board for scheduled and unscheduled service appointments and on the Customer Hub when you right-click on a customer/location.	4.0.24
Default Start Time Setting	You can now set up a company-specific Default Start Time in Configuration Settings. This time will default in the following: - Appointment Wizard or New Resource Activity when accessed from right-clicking on a Resource. - New Service Appointment or New Job Appointment windows by right-clicking on an existing appointment.	4.0.24
Estimator and Project Manager displayed	The Job Detail window was updated to display the Estimator and Project Manager names instead of their IDs.	4.0.24
Date/Time Lock check box has been added to the Service Call window	The function of the Date/Time Lock check box is to prevent the service call from being rolled forward if you have the Roll Service Calls Forward option turned on in Service Management. A Date/Time Lock icon displays on the service appointment when this is marked on the service call (from Schedule or Service Management).	4.0.24
Added validation window to Appointment Wizard process	The new validation window in the Appointment Wizard displays the appointment count, primary key elements (Job/Cost Code, Service Call ID, Activity ID), date range, and resource count. This gives you the chance to cancel in case you've made an error in the Appointment Wizard.	4.0.24
Added the option to show/hide the horizontal scrollbar	Added the option to show/hide the horizontal scrollbar when viewing the Schedule in the Timeline view. This option has been added to the Global Options section in Settings.	4.0.24
Timestamp window display update	The Timestamp window displays a red background if the actual timestamp on a Service Level Agreement (SLA) item is later than the guaranteed time.	4.0.24

Enhancement	Description	Version
Added Address 2, City, State, and Postal Code columns in the Customer Hub	Added Address 2, City, State, and Postal Code columns in the Customer Hub.	4.0.24
Added main column headers for the Customer and Location columns in Customer Hub	Added main column headers for the Customer and Location columns so that you can drag all three Customer columns (Name, ID, and Notes) or Location columns (Name, ID, and Notes) at the same time. You can rearrange the three columns (Name, ID, and/or Notes) underneath the Customer and/or Location bands.	4.0.24
Ability to manually log out of Schedule has been added	The ability to manually log out of Schedule has been added.	4.0.24
Added the option to Find a customer and location by Maintenance Contract from the Customer Hub	Added the option to Find a customer and location by Maintenance Contract from the Customer Hub.	4.0.24
User Profile page has been added to Schedule	Users can view the name associated with their user profile, email address, ERP user account, default company, user role, and time zone. If you have Global Filtering turned on in Microsoft Dynamics GP, the user's affiliate/region/branch information also displays.	4.0.24
Added functionality to 'Complete' appointment status	When an Appointment Status is set to COMPLETE, the Completion Date field is enabled. The Completion Time is set automatically to display the time based off the Start Time and the Actual Hours. The Actual Hours is initially set to the Estimated Hours. If you edit the Actual Hours, the Completion Time is updated.	4.0.24
Search by maintenance contract using the Find feature on the Customer Hub	You can now search by maintenance contract using the Find feature on the Customer Hub.	4.0.24
Updated date/time picker	The Date Picker, used to select the date and time in various windows, has been updated for easier use.	4.0.24
Added access to New Appointment window in Customer Hub	The New Appointment window can now be accessed by right-clicking on a service call from the Service Call tab in the Customer Hub.	4.0.24
Additional access to Appointment Wizard	Appointment Wizard can be accessed by right-clicking on: - An empty cell on the Schedule Board. - A service call on the Service Call tab from the Customer Hub.	4.0.24
Added the ability for users to double-click an appointment on the Customer Hub	Added the ability for users to double-click an appointment on the Customer Hub to open an appointment on the Schedule Board.	4.0.24

Enhancement	Description	Version
Added functionality for users to be able to reschedule, split, and/or delete appointments	Added functionality for users to be able to reschedule, split, and/or delete appointments that were created using the Appointment Wizard. In the Related Appointments by Group ID window, you can either select all appointments or specific appointments. Then you can choose to reschedule, split to a new group, or delete. When rescheduling or splitting, you can edit the description, status, start date, estimated hours, days between appointments, and if you want to skip Saturday and/or Sunday.	4.0.24
Added ability to add, edit, and/or detach contacts from within the Location Contact	You can now add, edit, and/or detach contacts from within the Location Contact panel of the Customer Hub if you are using Contact Management.	4.0.24
User can change their Schedule password from the new User Profile page.	User can change their Schedule password from the new User Profile page.	4.0.24
Updates to map view	Map View has a new feature that lets you draw a shape on the map to include any unassigned appointments to the selected technician's route. You also have an option to toggle the view for current traffic.	4.0.24
New Job Schedule by Cost Code report	Job Schedule by Cost Code report allows you to view the job information and the end-of-report footer includes hour totals for all jobs included in the report.	4.0.24
Added Job Panel to Schedule Board	An optional Job Panel has been added to the Schedule Board. The Job Panel displays a list of the available jobs. You can quickly view high level details about the job. A context menu is available by right-clicking on a specific job that gives you the ability to view more details about the job, customer, and/or location or you can open the Appointment Wizard or create a new job appointment. The context menu also provides you with the option to print a Job Schedule.	4.0.24

Enhancement	Description	Version
Updated Grouping, Sorting, Filtering	The Customer Hub has been updated to provide you with a better experience when grouping, sorting, filtering, and displaying customers and locations. - Group: To group the display by a column, select a column header and drag this to the area labeled. Drag a column header to the group location to group the results by that column. - Sort order: Select the column header to change the sort order. A small triangle points to indicate if the sorting is ascending (A-Z) or descending (Z-A). Hold the Shift key when selecting headers to sort against multiple columns simultaneously. - Filter: Select the lookup to choose a filter type (contains, does not contain, starts with, ends with, equals, does not equal) and enter the value in the field to the right of the lookup. - Column Order: Drag the column headers to the left or right to change the column order. - Scrolling: A horizontal scrollbar is hidden until you hover with your mouse at the bottom of the grid. When the horizontal scrollbar displays, you can drag the bar to view more columns. A vertical scrollbar is automatically displayed.	3.0.7
Find Feature	A new Find feature has been added to the Schedule Board and Customer Hub. - Schedule Board: Users can now search for appointments by service call, purchase order, job, project, and resource. Right-click on the search result to use the context-sensitive menu to have the option to open a service call or appointment, unassign an appointment, unschedule an appointment, view on calendar, view job details, view customer details, and/or view location details - Customer Hub: Users can search for a contact name or customer phone number. From the right-click context menu the user can navigate to the customer or location details.	3.0.7
Job Appointment Notes	Job appointment notes can be created for any open job. A job appointment note can be viewed, edited, and printed from within Signature, MobileTech and Schedule.	3.0.7
Updated Timeline View	Depending on your Global Options Time Scale settings, view up to 5 days by choosing appropriate number in the Days to show drop-down in the far right corner of the schedule.	2.0.16
Service Channel Integration	Dispatcher resources can create service calls from ServiceChannel requests from the new Service Requests tab. New communication events have been added to Signature Agent so that if a service request has been updated or cancelled, dispatchers are notified by email.	2.0

WennSoft	Job Cost ***Supported Versions: 2025 and 2024 (2018 R9)***	
Enhancement	**Description**	**Version**
AIA Billing Report Update	The American Institute of Architects (AIA) billing report now includes a percentage total for Column G (last page).	**2025**
View all Service Calls Transferred or Scheduled to be Transferred to a Job	Prevent accidently closing a job while there are costs that haven't been accounted for in Job Cost by viewing all service calls transferred or scheduled to be transferred to a job. When a user looks up a job with related or linked service calls the call transfer button will show either a Green check or a Red X. The Green checkmark indicates at least one service call associated to the job where the cost was transferred to the job. The Red X indicates there is at least one service call associated to the job where costs HAVE NOT been transferred.	2024 - 2018 R9
View Closed Job History Status by Period	Users now have quick access to the Job history status by period from the job history window. In the Job History window, a new 'Status by Period' button has been added to the action's menu. Clicking the 'Status by Period' button opens a sub-window displaying the 'Job History Status by Period.'	2024 - 2018 R9
View Salesperson in the Job Maintenance Window	Conveniently add different salespeople at the job appointment level. This is particularly helpful when there are many appointments for a job, but it not always the same salesperson for each appointment. Previously salespeople could only be assigned at the customer level making it inconvenient and requiring extra invoice work to change the salesperson.	2024 - 2018 R9
Preview Bill Codes in the Job Status Window	Easily preview the Job Bill Codes report directly from the Job Status window similar to the report from the Job Bill Code window.	2024 - 2018 R9
Confirm potential impacts and risks when changing a job's contract value or contract type	Users will now see a message that warns the user of the potential impacts and risks before making a change to the job's contract value or contract type.	2024 - 2018 R9
SOP Billing Update	When copying additional lines into an SOP order that is assigned to SOP billing, when the user selects Save, they are prompted that the Job Cost code distributions are incorrect. The user will need to go to the Signature SOP Transactions window to add the cost codes on the new lines.	2023 - 2018 R8

Enhancement	Description	Version
Updated Filters in Job Close Window	We've updated the filters and sub-filters in the Close Job windows. * In the Filter section, you can now select one or more filters (job, project, customer, and/or division) to limit the display of jobs available to close. Previously, you could only select to filter by one criterion. Additionally, you can use the percentage (%) wild card in any of the filter fields. For example, if you entered B% in the Job field, only jobs starting with B will display. * In the Sub Filter section, you can now select to display only inactive jobs. You can also now enter an As Of Cost Posting Date to limit the jobs by the date of the last cost on a job.	2023
Improved Recreate Summary Performance	The Recreate Summary performance has been updated and now processes considerably faster.	2023
Enhanced AIA Job/Project Invoice	For the AIA Job/Project Invoice, we've increased the company name character length from 41 to 65 characters so that the AIA Invoice will print as expected for companies with a name that falls within the 65-character limit.	2023
Print Button has Job Notes and Custom SSRS Reports available.	We've added the ability print job notes and custom SSRS reports to the Job Maintenance, Job Status, and Job History windows. Previously, selecting the Print button would only print the Job Report. Now, select the Print button and then select the report you'd like to print. Job Report and Job Notes are static options. You can add up to four custom SSRS reports to the open job windows (Job Maintenance and Job Status) and up to four custom SSRS reports to the closed job window (Job History). When printing Job Notes from any window, all notes for the job are included in the report.	2018 R7
Add attachments to Service and Job Appointments	We've added the capability to add attachments to service and job appointments by selecting the paperclip icon to the right of the Appointment field. The attachment remains at the job appointment level.	2018 R7
Inventory Adjustment	Users can now create an inventory adjustment with a quantity and no cost that is put to a cost code with a profit type of 8 (flat rate per unit) to produce a line on a transaction level invoice (job or project level).	2018 R7
Updated .Net Job Close Window	We've updated the .NET Job Close window so that the user is now prompted to print the Closed Jobs report after running the job close process.	2018 R7
View billed amounts from Project Invoice Entry window.	Users can now view the Billed Amounts for a specific job on a project. On the Project Invoice Entry window, focus on a job line. Select the arrow to the right of Reimbursable to open the Project Billing window. Select the newly hyperlinked Retention Due label to open both the Billed Position and Billed Amounts window.	2018 R6

Enhancement	Description	Version
Updates to Job Cost Notes window	The Job Cost Notes window has been updated to include the Created User, Modified User, and Last Changed date and time. The Note Index field has been renamed to Subject and the Author field has been renamed to Current Owner.	2018 R6
Job Status includes unposted costs column and new report	The Job Cost Status inquiry window now displays an Unposted Costs column to display unposted cost transactions that are saved in a batch where costs are assigned to a cost element for the job. Users have the option to print a new Job Unposted Cost report. The Job Status report has been updated to include unposted costs.	2018 R6
Search for a job in the Job Close window	Added the ability to search for a job in the Job Close window. To use the search, under Filters, mark the new Job radio button to enable to search field. You can enter a specific job number or use the lookup button to open the Job Lookup window. The job displays in the Available to Close section if it can be closed.	2018 R6
Project Status Inquiry includes Unposted Costs column	The Project Status inquiry window now displays an Unposted Costs column to display unposted cost transactions that are saved in a batch. Select Unposted Costs to open the new Project Unposted Cost by Job window to display unposted cost by job for the project. The Project Status report has been updated to include unposted costs.	2018 R6
Updates to Job Close window	In the Job Close window, the discount applied to a job is now included in the amount applied so that the job can be closed as expected.	2018 R6
Updates to Jobs List window	The Jobs List window, accessed from the Job Cost navigation list, has been updated to open the .Net Close Jobs window with the jobs auto-populated. If you've marked any jobs in the Job List window and then select the Close Jobs button, the jobs available to be closed will be marked in the Close Jobs window.	2018 R6

Enhancement	Description	Version
Job Close window messaging updates	Updated the messaging in the Job Close window to help identify when not all jobs selected were closed. When the Close Jobs button is selected, users may receive one or more of the following messages: -If a batch is created: “Batch Number XXX was created!” -If a batch is not created but ALL selected jobs were closed: “The close job process is complete.”. -If a batch is not created but not ALL selected jobs were closed: “The close job process is complete. X of XX selected jobs closed.” This message will show you the number of jobs closed out of the total number selected. The user would have to view the Jobs Not Available list to see why. -None of the jobs closed: “None of the selected jobs were closed. Review the (Not Available to Close) grid or report for the reasons why each job is not available.”	2018 R6
Tracking changes to contract amount	When a contract amount is changed, the date, time, and user ID are now inserted into the JC00114 table.	2018 R6
Updated error message	Updated the error message that displays when recreating a summary that will change historical data for the jobs. Note that the Recreate Summary utility is on a secure menu that requires a password.	2018 R6
Transaction entry buttons on Job Status	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.	2018 R5
Reprint posted project level invoice	Users can 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.	2018 R5
Mark/Unmark All in Project Level Billing	Users now have the ability to mark/unmark all transactions when doing Project Level Transaction-Level Billing.	2018 R5
SSRS reports	-Job Plan report: Allows you to view the job plan information Gantt-style schedule that displays a row for each job -Job Schedule by Cost Code report: Allows you to view detailed job information End-of-report footer includes hour totals for all jobs included in the report	2018 R4

Enhancement	Description	Version
Added the ability for users to choose how sales tax is applied at the Job level and at the Project level	Added the ability for users to choose how sales tax is applied at the Job level and at the Project level. There are currently five states (WA, NV, TX, OH & DE) that require that sales taxes on the Job Cost invoices be calculated based on the gross receipts (sales amount not reduced by retention).	2018 R4
Job Close window has been updated and enhanced	Users now have the ability to filter jobs for immediate closing or saved into a schedule table for processing later. New SSRS reports include Available to Close, Not Available to Close, and Closed Jobs.	2018 R4
SSRS reports	The following reports have been updated to include new or updated features in MobileTech 7.0. Job Appointment Reports: - Job Appointment Summary.rdl Added the customer and technician signatures. Added the new Job Resolution Note. (Signature 2018 R3 and higher) TimeTrack Reports: - Time Sheet.rdl – Updated the technician signature.	2018 R3
Job Appointment Resolution Note in MobileTech	Job appointment notes can be created for any open job. A job appointment note can be viewed, and/or edited from within Signature, MobileTech and Schedule. During the job appointment completion process in MobileTech, a technician will be able to create a job appointment resolution note. This note will be created with Resolution as the note subject. The job appointment resolution note is included on the updated Job Completion Appointment Summary report which, when generated, can now be signed by the customer and technician before emailed from MobileTech.	2018 R3
SSRS & Dexterity Reports	A RPO - Billing Profitability report was added for the new RPO method of revenue recognition. Several dexterity reports were updated to accommodate company's who are set up to use RPO for revenue recognition. See the 2016 R3 Read Me document for a full list of updated reports.	2016 R3
RPO Functionality	The Revenue Performance Obligation revenue recognition method has been added to Job Cost. The Revenue Performance Obligation (RPO) revenue recognition method has been added to Job Cost. This is in accordance with the Accounting Standards Update (ASU) 2014-09, Revenue from Contracts with Customers (Topic 606). Under the new standards, a contract is broken down into performance obligations. For more specific information, see http://www.fasb.org.	2016 R3

Enhancement	Description	Version
Bill To Customer/Address fields to assist with 3rd party billing	Bill To Customer and Address fields have been added to the Job Maintenance window to provide the ability to set up a customer for billing that is different from the customer on the job. The Customer ID of the job will default into the Bill To Customer field, but you can choose a different customer. The Bill To address set up in Customer Maintenance will default when the Bill To customer is selected. The tax schedule defaults from the job customer regardless of the customer selected as the Bill To customer. Other windows/reports updated with Bill To Customer/Address fields: - Job Invoice Entry window - Transfer Service Costs to Job window - Job Maintenance History window - Dexterity Job Invoices including unposted, batch, posted, and history invoices - JC Job report - JC Job History report	2016 R2
3rd party billing from the Project Invoice Entry window	The Project Invoice Entry window now has the same functionality for 3rd party billing as the Job Maintenance window. The Customer Number field is now editable along with the addition of Bill To Customer and Address fields. The Customer Number assigned to the project automatically fills the Bill To Customer field, but you can choose a different customer. The Bill To address set up in Customer Maintenance will default when the Bill To Customer is updated. The tax schedule defaults from the project customer’s address regardless of the customer selected as the Bill To customer. Project Invoice reports have been updated to include the Bill To customer and address.	2016 R2
Ability to print the Job Closing Preparation SQL Server Reporting Services (SSRS) added to Job Maintenance and Close Jobs windows	This report will show all reasons why a job cannot be closed. This report will be available if you have set up SSRS. If you attempt to inactivate a job that does not meet the requirements, you will be prompted to print this report.	2016 R2
SSRS Job Cost Retention report	The Dexterity version of the Job Cost Retention report has been replaced with a new SSRS version.	2016 R2
Email capabilities for Purchase Orders	We’ve added the ability to email a purchase order to a vendor from the Signature Purchase Order window, an alternate Dynamics window. You can set this up individually for each vendor or you can assign email settings to multiple vendors.	2016 R2

Enhancement	Description	Version
Batch Creation windows	We’ve added new batch entry windows for limited Dynamics GP users. The new batch windows are used in certain Service Management, Job Cost and Equipment Management windows. From the new batch windows, users can only create and/or edit batches.	2016 R2
Added the ability to automatically update billing transactions to the Not-to-Exceed (NTE) amount for Cost Plus NTE transaction level jobs.	When using NTE billing, the billing amounts for the transactions displayed will adjust so that the final billing amount does not exceed the NTE amount.	2016
New option to improve the process performance of running payroll. (Union and Rate Classes)	For users who ONLY use Rate Class to determine the pay rate amount for payroll transactions, and where Union reporting is NOT a requirement, we have added a new option to improve the process performance of running payroll. By adding the following line to the Dex.ini file, benefit and deduction records will not be gathered in our tables: - DisableRateClassBenefitsAndDeductions=TRUE CAUTION: DO NOT USE this option with the Rate class Prevailing Wage or Highest Wage options.	2016
Signature SmartList Designer Objects.	With Signature 2016, we've added the Signature SmartList Designer Objects. If you currently are using SmartList Builder, we recommend that you continue using the Signature SmartList Builder Objects. The following SmartList Designer objects are available to import: Job Cost: - Job Cost Codes.xml - Job Cost Job Billing.xml - Job Cost Jobs.xml - Job Cost Subcontractors.xml Service Management: - Service Call Source.xml - Service Customer Locations.xml - Service Equipment.xml	2016

Enhancement	Description	Version
HTML 5.0 Web Client compatibility	Signature 2016 introduces HTML 5.0 Web Client compatibility which will render Service Management, Job Cost, and Equipment Management forms as HTML5 web pages. The Web Client delivers only the top, visual interface to the device, while computing is still done at the server level. The Web Client offers support for: - Multi-browsers - Any browser that supports HTML 5 such as Internet Explorer, Edge, Chrome, Firefox, and Safari. - Multi-device - Any device that supports HTML5 web browsers such as Android, iOS, and Windows. Note: When using the Web Client, file attachments can only be viewed from and copied to the Microsoft SQL Database.	2016
Contract Agreement Payables Entry building requirements (for Australia)	Contract Agreement Payables Entry window has been updated to meet the requirements of various Building and Construction Industry Security of Payments Acts in Australia.	2013 R3
Contract Claimed Amounts window	Contract Claimed Amounts window has been added to assist with entering the approved payment and you can enter a reason in the comment field.	2013 R3
Subcontractor reports (for Australia)	Two reports: - Subcontractor Supplemental Report - Subcontractor Claims	2013 R3
SSRS reports	The following SQL Server Reporting Services (SSRS) reports have been added or enhanced: - Certified Payroll for Public Works (New) - Annualized Labor Loading report (New) - JC PM Aged Trial Balance (New) - SRS Grouped Invoice (New) - Historical Aged Trial Balance - Service Call Cost Audit	2013 R2
Project percentage of completion revenue recognition	If you are using the Project Level module, you can use the project’s percentage of completion (POC) to recognize revenue. Previously, POC was calculated and posted at the job level. The project POC will be applied to each job that is assigned to the project and used to calculate the contract earned for each job, and the project as a whole.	2013

Enhancement	Description	Version
Loss Recognition	If you are using the Project Level module and the Percentage of Completion (POC) revenue recognition method, you can automatically recognize a loss for a job or project as soon as a loss is anticipated, regardless of when the costs will be incurred.	2013
New vendor contract transactions zoom	You can view a summary of contract-related vendor transactions on the Job (Contract) Transaction Inquiry - Vendor window. You can open this window by zooming on the Contract Released field on the Contract Agreement window.	2013
Job Estimating Enhancements	Adding cost code estimates to new or existing jobs now creates an estimate transaction for each cost code estimate. This allows users to know exactly when the estimate was added, even when the estimate was added to the job after the period in which the job was initially created and a change order was not used. By capturing estimate revision date history you can create an estimate audit trail when needed.	2010 R3
Work in Progress (WIP) Enhancements	Manage Work in Progress (WIP) and Cost of Goods Sold (COGS) by delivering more relevant and timely financial reporting; adding automation in Service Management to generate reversing journal entries when required by the change of a division or call type on a service call.	2010 R3
WIP Account Reconciliation Tool	Allows you to compare your Job Cost and Service Management WIP sub-ledgers to the General Ledger; sorting and filtering functionality enables you to easily identify the discrepancies that are causing an imbalance in your WIP accounts.	2010 R3
WIP Account Reconciliation Tool	Allows you to compare your Job Cost and Service Management WIP sub-ledgers to the General Ledger; sorting and filtering functionality enables you to easily identify the discrepancies that are causing an imbalance in your WIP accounts.	2010 R3
Excel Forecast Revision for Job Cost	This feature is a Microsoft Excel application that provides the ability to view all cost codes associated with a job and in workbook mode, adjust the forecast. Project managers can update Forecast Revisions and save as a project wide revision to allow Finance to approve and submit for change. The Excel worksheet will be saved as part of the forecast revision document in Job Cost.	2010 R2
Vendor Payments	Provides the ability to view vendor payments by job.	2010 R2
Subcontractor Contracts	Provides a contractor the ability to manage subcontractors with contracts (not using PO's). Contracts will include: Positive or negative changes, manage insurance/other documents, payments, multiple cost codes to a sub, and multiple subs to a job.	2010 R2
Open a Closed Job	Provides the ability to open a job that has been closed within an open financial period.	2010 R2
Service Call cost integration to a job	Provides an automated process to move cost and billable amounts from a work order to a cost code on a job. A link from the cost code will take you directly to the work order for reference of the work completed.	2010 R2

Enhancement	Description	Version
Shift Premium	Automatically calculates the additional pay amount for a shift, versus having multiple pay rates. This feature is an extension of the Microsoft Dynamics GP 2010 feature, which allows you to include additional pay amount to an hourly wage for employees as incentive for working outside the regular day shift, such as second shift or third shift. When entering a payroll transaction, the shift premium will default automatically based on the shift code that is assigned to the employee's pay code. Depending on what application you are using to enter labor transactions, the shift code can be edited per transaction.	2010
Reimburse Expenses thru AP for TimeTrack	Eliminate having to cut multiple checks or additional payroll steps to reimburse expenses to a technician. For companies that pay their technicians for expenses through Accounts Payable rather than Payroll, this feature will enable this to happen. For the technician, nothing changes. They process their time and expenses through MobileTech or TimeTrack as they currently do. When TimeTrack is processed, if this setup option is checked, the expense elements will be processed to AP for both Service Management and Job Cost transactions.	2010
SQL Server Reporting Services (SSRS) Report Templates	Streamline reporting efficiency with templates for building out SSRS reports which can be tailored for your organization. These report templates can work with any view or table and provide an easy way to make basic reports and charts. This allows a technical resource to build and modify the templates in Report Builder (free with SQL Server Reporting Services).	2010
Prevailing Wage	The payroll entry resource will no longer need to remember this data and the system will automatically make the changes necessary when time cards are processed. Accommodates several prevailing wage and benefit scenarios, including the following: prevailing wage is higher than employee standard wage, employee standard wage is higher than prevailing wage, prevailing fringe is higher than employee standard fringe employee standard fringe, is higher than prevailing fringe. In addition, you can run a Certified Payroll report (SRS version), which has been modified to address the Davis-Bacon Act (DBA) wage determinations.	10.0 EX FP2
Support landed cost on PO return documents	Landed Cost is a cost that is typically associated with costs of an internationally shipped item including freight, duties, taxes and storage charges. This enhancement allows for a reversal of landed cost when processing a returns transaction by retrieving the amount of the landed cost that originally posted to the service call or job.	10.0 EX FP2

Enhancement	Description	Version
Canadian handling of GST and PST taxes on PO documents	In Canada, the GST is often recoverable via input credits and therefore not technically a cost to the job or service call. This feature will allow a user to specify which tax details hit the job and WIP account as costs to the job and which go directly to the GL.	10.0 EX FP2
Prevailing Wage	The payroll entry resource will no longer need to remember this data and the system will automatically make the changes necessary when time cards are processed. Accommodates several prevailing wage and benefit scenarios, including the following: prevailing wage is higher than employee standard wage, employee standard wage is higher than prevailing wage, prevailing fringe is higher than employee standard fringe employee standard fringe, is higher than prevailing fringe. In addition, you can run a Certified Payroll report (JC only, SRS version), which has been modified to address the Davis-Bacon Act (DBA) wage determinations.	10.0 EX FP2
Support landed cost on PO return documents	Landed Cost is a cost that is typically associated with costs of an internationally shipped item including freight, duties, taxes and storage charges. This project allows for a reversal of landed cost when processing a returns transaction by retrieving the amount of the landed cost that originally posted to the service call or job.	10.0 EX FP2
Automatic Item Creation	Future ordering of a new item made easier from the catalog. When entering a new item in Purchase Order processing (POP) or Sales Order Processing (SOP) and the item ID is not already in the Item Master but resides in the manufacturer/vendor catalog table, you are able to select the item and create the item Master Card. This is for the GP SOP/POP windows only, and will not be available when using the Service Management SOP/POP windows for these types of transactions.	10.0 EX FP2
Canadian handling of GST and PST taxes on PO documents	In Canada, the GST is often recoverable via input credits and therefore not technically a cost to the job or service call. This feature will allow a user to specify which tax details hit the job and WIP account as costs to the job and which go directly to the GL.	10.0 EX FP2
Credit Wages and Overhead back to employee's home department	During WennSoft payroll post, this enhancement allows both the Service Call or Job Division and Department to drive the credits so the home department is not penalized when an employee works in a different department.	10.0 EX FP1
Support over-scale employee pay rates	Users can compare employee home rate class, employee-specific pay rate in Payroll setup and user-entered rate class. Optionally, users can now take the greatest of the 3 with allowable override at entry.	10.0 EX FP1
Support over-scale employee pay rates	Compare employee home rate class, employee-specific pay rate in Payroll setup and user-entered rate class. Optionally, users can take the greatest of the 3 with allowable override at entry.	10.0 EX FP1

Enhancement	Description	Version
Transaction Entry Import Validation	SQL stored procedure for WennSoft GL transactions that performs validation and write simultaneously to the WennSoft Transaction Entry window and the GL. This is a useful tool for building solutions to import Job and Service Call/Contract beginning cost balances or importing from other systems.	10.0 EX FP1
Microsoft SQL Server Reporting Services	Contains a set of Microsoft SQL Server Reporting Services reports. These reports can be printed in a variety of formats, provide better access to your data and can be easily modified to satisfy your specific needs. Examples of these reports include invoices, service work orders and new service contract reports.	10.0 EX FP1
Asset ID	Users can now assign the asset ID at the job level. This replaces the requirement that the job number be the same as the asset ID for asset jobs and gives users more flexibility in setting up jobs and assets.	10.0 EX
Exclude job from Percentage of Completion	For companies that have fixed asset jobs or other jobs that they do not want included in POC calculations, this allows them to remain off of the edit list and journal entries.	10.0 EX
Percentage of Completion Edit List	Expected contract, total revised forecast and total cost fields have been added to the POC edit list. This allows users to review POC calculations at the job level and make any necessary changes prior to posting. WIP Reconciliation Reports have been added to reconcile WIP amounts in Job Cost to General Ledger WIP balances. Reports identify discrepancies in transaction posting to the General Ledger, improving the audit process.	10.0 EX
Microsoft Project Integration	Allows for the import of one or many jobs from Job Cost to a Project Plan or export from Microsoft Project to create a new job. Functionality also enables configurable synchronization of actual costs, units as well as percent complete. This integration effectively enables field Project Managers to utilize one tool to manage project tasks and forecast completion and total cost.	10.0 EX
Project Model	Provides functionality for users to allocate the revenue for a Job Cost Project to child jobs by percentage at the job and bill-code level. This also introduces Project Level Bill Codes and two new billing types for T&M and Fixed Jobs.	10.0 EX
Project Transaction Level	When billing at the project level, this enhancement incorporates use of bill codes and transaction level detail on invoices together. This is useful for Professional Services organizations that share revenue across offices, but want to provide a single invoice to the customer.	10.0 EX
Re-Open a Closed Job Cost Fiscal Period	This enhancement removed extra fiscal period records, added ability to auto-create Job Cost periods when creating GL fiscal periods and also allows a user to re-open a fiscal period, even if jobs have been closed since the fiscal period was closed.	10.0 EX

Enhancement	Description	Version
Display Job Number / Service Call on Inventory Transaction Zoom	Provides users with the ability to drill from GL to Job Status or Service Call, delivering a tighter integration between WennSoft and GP Financials.	10.0 EX
Job/Service Appointment Scheduling Enhancements	Allow for scheduling of appointments for both jobs and service calls through a single scheduling engine. Support for job appointments in Graphical Schedule Board and MobileTech are an increasing requirement for technical organizations who share the same labor resources across both jobs and service calls.	10.0 EX
Rate Class Enhancements	Rate Class union reports include service call transactions and unbilled transactions. Rate class drives and captures benefit and deduction amounts by transaction, including Service and Unbilled (requires rate class and union code). New benefit calculation methods of % of Net Wages, % of Gross Wages, % of ded action, % of earnings wages. Multiple unions in a rate class and same union in multiple rate classes (same union may use different rates depending on type of work such as Heavy Commercial vs. Light Commercial). Benefits and Deductions which are not set up in Rate Class, still calculate if assigned to employee. This is useful for employee specific items such as fixed amount garnishments. If a benefit has reached a threshold in a prior pay run then the system will not include it in a run.	10.0 EX
Inventory Transaction Zoom	Display Job Number / Service Call on Inventory Transaction Zoom – provides the user with the ability to drill from GL to Job Status or Service Card – delivering a tighter integration between WennSoft and the Financials.	10.0 EX
Change Order and Cash Receipts History	Change order and cash receipt history is available for closed jobs. The Job History window allows users to view change order and cash receipt details for closed jobs, which is helpful in analyzing the success of past jobs and estimating new projects.	10.0b01
Group Time Card Entry	The Group Time Card Entry window expedites data entry for fixed asset transactions or labor for work crews and service technician teams. Users can select a group of assets or employees and match the group to a parent labor transaction. The system matches job, date and time to the parent and automatically creates transactions for each item in the group, eliminating the need for manual entry of each transaction and increasing efficiency. Users can also display all labor or asset transactions for a job and day in one window.	10.0b01
Percentage of Completion (POC) based on Labor Hours	Enables the use of actual labor hours divided by forecasted labor hours to determine percent complete for revenue recognition and recognize revenue.	10.0b01
Simplified reporting	Allows users to easily preview and print reports from within the application using a new common printing DLL.	10.0b01

Enhancement	Description	Version
Percentage of Completion	Sorting options are available in Job Status, making it easier and faster to search for jobs and track job performance. Additionally, processing time has been improved for the POC Edit List and monthly closing.	9.0
Maintenance History	A Job Maintenance History window gives users the ability to track more information on closed jobs.	9.0
Multi-Currency Bill Code Invoicing	Users can assign any currency to a job and print detailed invoices in that currency regardless of the company's currency. Billing amounts are entered in the currency assigned to the job.	9.0
Forecast Revisions	Forecast revisions can be entered based on units and an amount per unit, making it easier to determine forecasted cost per unit based on forecasted cost and manage labor on a job based on hours.	9.0
Alternate General Ledger Entry Window	Using journal entry, users can transfer costs from a service call to a job and vice versa, add costs to a job or service call or move costs from one service call to another. In addition, users can enter costs to many service calls/jobs on the same journal entry. When multi-currency and inter-company General Ledger transactions are posted, jobs and/or service calls are updated.	9.0
Additional Setup Windows	This addition provides users with additional setup options for both Job Cost and Service Management.	9.0

WennSoft	TimeTrack ***Supported Versions: 2025 and 2024 (2018 R9)***	
Enhancement	**Description**	**Version**
Signature Time	TimeTrack Add-In for Signature Time	2024
Updated the Exporting TimeTrack Data process	We've updated the Exporting TimeTrack Data process so that the commit process is now run before exporting the file. Transactions that had errors and were not committed (and still in table WS10702) are removed from table WS50000.	2023
New Setup option: Exclude historical non-salary transactions from Export Batch	We've added a new setup option to exclude historical non-salary transactions tied to the Week-Ending Date from being exported. In the TimeTrack Setup Options window, under Third Party, mark Do Not Include Historical Transactions. For example: You have transactions that have been committed with a week ending date of 07/10. The export file was created, but there was a problem with the file and some transactions were missed. You create a new batch ID and add transactions (week ending date 07/10). **With this option MARKED** When you go through the Commit process, the Export Wizard ONLY reviews ONE WS10702 table. These non-salary transactions will be included in the export file. **With this option NOT MARKED** When you go through the Commit process, the Export Wizard reviews the WS10702 and WS30702 tables. Based on the week-ending date you have entered in the Export Wizard, the system will find all the transactions within WS10702 and WS30702. These transactions will be included in the export file.	2018 R7
Importing Comma Delimited File Supported	Users now have the option to import a comma-delimited text file. Previously, users could only import a .csv file.	2018 R7
Notes window update	The Time Track Notes window has been updated to rename the Note Author to Current Owner and Modified Date to Last Changed date.	2018 R6

Enhancement	Description	Version
New Time In/Out window functionality	Users can now enter time in/time out values in the new Time In/Time Out window accessed from the Time Card Entry window by selecting the clock icon next to the Hours label. The date defaults to the selected day of the week for the current week, however, you can edit this date. If the date is changed, the day of the week is updated on the Time Entry window. Enter the date/time for the time in and time out values and select OK. The hour value is calculated and displayed in the Hours field. If an hour value already existing in the Hours field, it will be overwritten with the new value. If you manually edit the hour value, the time in/time out values are not updated to reflect this change and the time in/ time out values print on the Edit List as entered. The time in/time out values entered must be within the batch date range.	2018 R6
Payroll posting process improvements	The payroll posting process has been updated to improve the time required to post transactions to Service Management for Service Invoicing.	2018 R6
Dynamics GP Distributed Process Server for payroll posting	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.	2018 R5
Signature payroll post updates	We've added two new buttons to the Signature Payroll Post window, Mark All and Unmark All. 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.	2018 R5
Export enhancement	The TimeTrack Export performance has been enhanced to reduce processing time.	2018 R5
Registered users updates	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. 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.	2018 R5

WennSoft

MobileTech
Supported Versions: 2025 and 2024 (10.0)

Enhancement	Description	Version
Optimizations	1. If you or another administrator forgets the MobileTech Integration User account password, you cannot retrieve the existing password, but you can change it. While the option is displayed to all users under Tools, only a SQL sysadmin can access this window. The password must meet the password policy requirements set up in Resco Cloud and for SQL users. 2. The sync process has been optimized to reduce device synchronization time. 3. We've replaced the need for the eTimeTrack Web Service to be installed and are now using stored procedures. 4. We've updated the Load Data window to display additional error information. You will now see which technician batch has the error, the stored procedure (if applicable), and the error message. This information will only display on the parent sync. If any child syncs have errors, you will see "One or more errors occurred".	**2025**
Updates for Jobs	1. You can now create a change order at the job level without a job appointment. 2. All notes related to a job are now visible from the Notes tab. 3. We've added the Job User Defined 1 and User Defined 2 fields (JC00107 table) to the MobileTech Woodford project. You can add these read-only fields to display if needed on jobs in MobileTech. 4. We've added a cleanup step for job cost codes to clean up orphaned records. You will need to recreate the cleanup job to add this step.	**2025**
Updates for Service Calls/Appointments	All notes related to a service call (and service appointment) are now visible from the Notes tab.	**2025**
Refrigerant Tracking Compliance Updates	Refrigerant tracking has been updated to comply with the American Innovation and Manufacturing (AIM) Act's 2026 reporting requirements. The AIM Act brings major changes to refrigerant management. Businesses must meet new regulatory requirements for tracking, reporting, and leak detection by January 1, 2026.	**2025**
Consumed Inventory update	The Consumed Inventory form now uses the same decimal places for the Quantity field that Signature does. This only applies to inventory items, with no changes to non-inventory items. You will need to refresh the Site Inventory lookup to view this change.	**2025**

Enhancement	Description	Version
Technician Email Auto-Added to Schedule	In MobileTech Admin, when adding or updating a technician, the technician’s email is automatically added in Schedule. This only updates the email address for the technician if there isn’t an existing email address in the K2A_ResourceExtension table and the K2A_ResourceExtension table must already exist.	**2025**
Six Ways to Make the MobileTech Interface Easier and Faster to Use	1. View originating Call ID on Service Call Screen Description: A read-only field has been added on the Service Call Screen to conveniently show the originating Call ID. 2. Add multiple attachments at once Description: Why can't I add multiple attachments all at the same time? Now you can with MobileTech 2024 (10.0). This will greatly speed up the process for technicians to select all the attachments that need to be added. 3. Confirm intent to Save/Discard changes when closing a task form Description: Technicians can now make changes and confirm or discard them with the new confirm intent to save/discard changes when closing a task form. This will eliminate the frustration of MobileTech automatically saving changes that the technician wanted to discard. 4. Add multiple inventory items at once Description: Everyone likes less clicks. Now in MobileTech 2024 (10.0), you can easily add multiple inventory items at once saving time to get onto completing the next task. 5. Navigate to equipment from the task details page Description: Speed up the workflow from the task details page directly to the equipment form. Now in MobileTech 2024 (10.0) you can in one-click navigate directly to the equipment form. 6. Make notes more accessible to techs Description: Never miss a note. In MobileTech 2024 (10.0) a simple note icon is shown when there is a note next to an item. Now technicians will be able to quickly reference notes such as customer, location, or service call notes on a service call.	2024 (10.0)

Enhancement	Description	Version
Three Ways to Improve Equipment Tasking	1. Manage incomplete equipment tasks Description: With one-click, select the drop-down for 'Incomplete Equipment' from the task list. There you'll see a list of equipment that have at least one open task. Simply click on 'Complete Tasks' and complete any incomplete tasks for the selected equipment. 2. Add new equipment from a task list Description: A new convenient '+' button has been added on the tasks list next to the 'All Equipment' drop-down to quickly navigate to the new equipment form. There the new equipment will be automatically assigned to the call and will be promptly synced after saving. Note: You won't see this option if create permission is disabled for equipment. 3. Assign new equipment to calls in the field with task list tasks and responses Description: A new setup option to use equipment assigned for service calls has been added to allow technicians to add equipment to MCC, MC, and/or any call type and have the corresponding equipment type tasks added to the call.	2024 (10.0)

Enhancement	Description	Version
Five Time Saving Enhancements	1. Prevent truck stock inventory items with negative or zero quantities from being added to work orders Description: Nothing is more frustrating than a technician thinking they have on-hand inventory in their truck to complete a work order and there is none. MobileTech now prevents inventory snafus from happening by not allowing truck stock inventory items with a negative or zero quantity (inventory items are not seen in the lookup list). 2. Add clean up step for inspection entities Description: Automates a background cleanup process for MobileTech Inspections attachments and tables. 3. Filter helper tech lookup by team or department Description: When there is a long list of technicians, many with the same first name, it becomes cumbersome to quickly find the technician/technician helper you are looking for. Now you can skinny down the list by filtering the list by the employee's team and department. 4. Add equipment type tasks to MC calls Description: A new setup option to use equipment assigned for MC calls has been added to allow technicians to add equipment to MC calls and have the corresponding equipment type tasks added to the call. 5. Show both the total user count and the company count in MobileTech Admin Description: The MobileTech Administration screen now conveniently shows how many MobileTech licenses are being used in the current company and all companies all at the same time.	2024 (10.0)
Improved collaboration between techs	View inventory used on a service call by other technicians Description: When multiple technicians are consuming inventory associated to a service call everyone needs an accurate view of inventory used by other technicians on the job. Now when a technician goes to the inventory tab on the appointment completion form, they can quickly see inventory items that have been consumed by other technicians for the associated service call.	2024 (10.0)
New Location Attachments	Add and view location attachments in the field Description: It's important for dispatchers and technicians to see location attachments that have been added by dispatchers in Signature in MobileTech. Now when an attachment is added/updated/deleted in Signature or added/updated in MobileTech both the back-office and front-office are synchronized.	2024 (10.0)

Enhancement	Description	Version
Increase Status Visibility for Dispatchers	Background Sync appointment status when key appointment events occur Description: Dependable near real-time appointment status between Signature and MobileTech is crucial to keep everything running on schedule. Now when the status of an appointment is changed, whether manually or automatically, there is a background sync to push the data into Signature to achieve near real-time appointment status in the back office or other software via APIs.	2024 (10.0)
Improved MobileTech Reporting	Easily send customer and location specific reports Description: Take the fuss out of customized reporting. Need a different SSRS report template for different Customers or Locations? With MobileTech 2024 (10.0), you can now specify custom report templates to use with your summary reports at either the Customer or Location level.	2024 (10.0)
Four Improvements in Support for Jobs in MobileTech	1. Create new job appointments in the field for any active job and labor cost code Description: A technician no longer requires a dispatcher to create job appointments for them. Technicians can now self-service themselves by adding a job appointment directly in MobileTech with the same convenience that they experience when creating new service appointments. 2. Use the job list in server mode Description: Assuming the MobileTech user has Internet access, they can switch to server mode to quickly perform a search. Users can select to search for Job (name/gpjobnumber/description) and/or Customer Location (customername, customer.name, location.name, gpcustomernumber, gplocationnumber). 3. Add job labor without an appointment Description: When you are on a job that spans multiple weeks there just might not be a job appointment set-up for each day/activity. In these types of scenarios, you can now add job labor in MobileTech without an appointment. 4. Create a new job in the field Description: Don't have an active job and need to create a job appointment on the go? No problem. MobileTech now supports creating a new job in the field.	2024 (10.0)

Enhancement	Description	Version
Two Productivity Improvements	1. Use optical character recognition (OCR) in MobileTech Inspections to answer questions Description: Technicians no longer must manually key in information such as long serial numbers, model numbers and other data into their smartphone. Now techs can quickly take a picture of an equipment nameplate and use OCR capabilities to automate the input of answers into questionnaires. The OCR capabilities support text, multiple lines of text and conveniently work offline. This greatly improves accuracy and speed eliminating the need to manually key in data. 2. MobileTech sync improvements Description: MobileTech synchronization has improved speed and reliability to make the technician experience of MobileTech easier and faster.	2024 (10.0)
Appointment Icon Displays New Appointment Notification	The Appointment icon from the home navigation now displays a notification number that indicates the count of new appointments after syncing the device. The notifications remain until the technician selects Dismiss New Appointments located at the top of the Appointments List (by selecting Appointments from the home navigation or from the Service Call form > Appointments tab) or if they sync the device again. If the technician dismisses the notifications of the new appointments from the Service Call form, only the notifications for the new appointments related to the service call are dismissed.	2023 (9.5)
Update to Role Maintenance	When adding technicians to Role Maintenance, you can now click a Select/Unselect All button to mark/ unmark the checkboxes to the left of the displayed technicians. The Deselect All is displayed once you have technicians selected.	2023
Map Unbilled Transactions	We have added the ability to map unbilled transactions to the Microsoft Dynamics GP General Ledger account number. When the technician adds an unbilled transaction, the GL account is added to the transaction.	2023
Service/Job Appointment Description Update	When the service or job appointment description exceeds 50 characters, an appointment note is created. The note can be marked as Is Internal so that the note does not appear on any customer reports. The note subject is titled Description. The appointment note can be viewed in as an attached note.	2023
SOP Inventory Transactions on Job Appt's.	You can now enter items to invoice through SOP on a job appointment in MobileTech. We've added a new Use SOP for Inventory in MobileTech option in the Job Cost Setup Options window that needs to be enabled. The inventory items are processed in the Mobile Inventory Inquiry window.	2023

Enhancement	Description	Version
Manage Resco Administrator Account	The Change an Administrator Password option available from the Tools menu has been renamed to Manage Resco Administrator Account. In addition to being able to update an admin's password, an administrator can now add an administrator account, add/remove access to one or more databases, and/or delete an administrator account. *This option is available only for users who belong to the SysAdmin role in SQL Server. These users can be Windows or SQL users. You can change the password for only one MobileTech administrator at a time.*	2023
Separate Time Entries Are Now Created	If a user times in/out and the resulting values overlap midnight of the default week-ending day, separate time entries are created. Midnight is determined by the technician's device. The first entry is for the time up to midnight (12:00 am) and the second entry is post-midnight (12:00). *For example:* the week-ending day is set to Friday. If a technician times into an appointment at 10:00 pm on Friday and times out at 2:00 am on Saturday, two entries are created. The first time entry is for the previous time period (10:00 pm to 12:00 am) and the second time entry is for the current time period (12:00 am to 2:00 am). The default week-ending day is determined by the existing Default Week-Ending Day that is set up in TimeTrack.	2023
Disable XOi Deep Linking by Customer	If you have any customers who do not allow the use of XOi onsite, you can now disable XOi Deep Linking for the specific customer(s). Go to MobileTech Admin > Setup Options > Options > Customer Setup. Mark the checkbox in the Disable XOi Deep Linking column.	2023
Updated MobileTech Cleanup Job	We've updated the MobileTech Cleanup job to include service appointment and job appointment steps with the following criteria. * Service Appointments: An integration record is created to delete the appointment. - With a Task_Date 14 days before or after the current date. - With a Task_Date within 14 days of the current date but have a status that is REASSIGN or COMPLETE. * Job Appointments: - With a Start Date 14 days before or after the current date.	2023
Updates to Field Invoicing	Field invoicing is now disabled when the Invoice_Type equals 1 (Fixed) or 3 (NTE) for the service call that originated from a quote in Service Management. The Reports tab is hidden and the Location Contacts are not displayed when completing the service appointment. With this new functionality, we have also added "invoicetype" to the servicecall entity for MobileTech.	2023

Enhancement	Description	Version
Update to Call Creation Process	MobileTech's new call creation process has been transitioned to now use wsiSMSServiceCall. (MobileTech had been using SMS_Create_Service_Call.) The transition was made to align the MobileTech process with the same process that we use with Schedule.	2023
Include Technician Name in Subject Line	You can set up MobileTech to automatically include the technician name (request the report) in the subject line and attachment filename. Add {0} to the Employee Time Sheet to add the technician's name as specified in the system user table	2023
Added Division to Middle-Tier Servicecall Entity	For reporting and/or filtering purposes, we've added Division to the middle-tier servicecall entity. This field is read-only and is not exposed on any of the MobileTech forms.	2023
New MobileTech Admin Setup Options	In the MobileTech Admin Setup Options window, you can now: * Search for a specific setup option name. The search is case-insensitive. Use the Clear button to remove the text from the Search field. * Collapse All/Expand All of the sections to quickly navigate to the specific section. The default view is with all sections expanded.	2023
Updates to Time Entry List	On the Time Entry list, we now display the Time-In/Time-Out or Begin Travel/End Travel times.	2023
Updated the Load Data Window	We've updated the Load Data window so that if any of the required lookup tables are missing lookups after the load data process, the Sync Lookups checkbox remains marked and disabled and the View Missing Lookups button is displayed. Select the View Missing Lookups button to display a popup window that lists the required lookups that do not have any records in their table. The required tables include callresolution, appointmentstatus, calltype, costcode, equipmenttype, extendedwarrantytype, manufacturer, paycode, problemtype, taskstatus, unitofmeasure, setupoption.	2023
Display Task Materials AND Replacement Parts	You can now choose to display the Task Materials AND Replacement Parts tabs on the Appointment Completion form for service appointments. Prior to the MobileTech 9.5 release, users could only enable one of these options.	2023
Site Now Defaults on PO Line Entry	When a technician only has one site assigned in Service Management, that site will now default on the PO Line when creating a non-inventory purchase order. If the technician has more than one site assigned: * The technician will need to select the site. * If the technician is assigned to the default site set up in Purchase Order settings, that site will default to the PO Line.	2023

Enhancement	Description	Version
Update to Report Email Options Window	In the Report Email Options window, the Call Type drop-down list has been removed for the Job Appointment Summary because call types are not available for job appointments.	2023
Change to Laborexpense.userdefine1 Mapping	The laborexpense.userdefine1 mapping has been changed to map to WS10702.User_Define_1. Previously it was mapped to US10702.LOCNCODE.	2023
Create a "Parts Needed" Resolution Note	You can now create a specific "parts needed" resolution note snippet in Signature that when selected in MobileTech, the Site Inventory list opens. Technicians can select the part and quantity needed. The resolution note snippet includes additional information related to the selected part. In Signature, create the resolution note snippet with a resolution code of PN. Then add the curly bracket information in the description text box along with any other labels that you want to display. *One example:* Part Needed Name: {name} Site: {site} Item Number: {itemnumber} Description: {description} Unit of Measure: {unitofmeasure} Quantity: {quantity} *Another example might be to have everything on one line without descriptions:* **{name} - {site}: {item number} - {description}, Quantity: {quantity}** ** The curly brackets and information within the brackets have to be exactly as written.* ** The resolution code also must be PN.* ** You can enter any descriptive text and the information does not have to be specifically written on separate lines.* ** The Quantity line is optional. If you want the Quantity field to display in the pop-up form, add the Quantity line.*	2023

Enhancement	Description	Version
Backoffice Added Inventory Now Visible	Inventory applied to a service call from the back office is now visible from the Inventory tab on the Appointment Completion form. Technicians cannot edit or delete these inventory items. These inventory items can be added in Service Management from an inventory adjustment or from an SOP transaction. *Only Invoice (SOPTYPE 3) inventory will be visible to the technicians. Return SOP (SOPTYPE 4) will not be visible to technicians.*	2023
Updated Field Labels	Field labels have been updated to display above the field instead of to the left of the field.	2023
Added a Read-Only Salesperson Field	We've added a read-only Salesperson field to the MobileTech Service Call sync payload. This field is populated from the SV00300 table. There are no UI or Plugin changes at this time, however, you are able to add the salesperson information as needed to reports, etc.	2023

Enhancement	Description	Version
Improved Security	**We have improved security by updating the sysadmin requirements:** * A user with the sysadmin server role (does not need to be 'sa' user) is needed to perform the initialinstallation or upgrade. * When entering Quadra parameters, the sysadmin user role is needed to apply MobileTech permissions on the entered QuadraDbName. **We've also changed what users can access in the MobileTech Admin > Tools menu.** * A user with the sysadmin server role, can do the following tasks: - Create MobileTech Objects - Update Middle Tier Database - Create Middle Tier Database Clean Up Job - Load Data - Refresh Lookups - Manage Resco Administrator Accounts - Update Password Policy - Launch Resco Cloud Dashboard - Install Resco MobileCRM Client * A 'mobiletech' user can do the following tasks: - Update Middle Tier Database - Load Data - Refresh Lookups - Manage Resco Administrator Accounts - Update Password Policy - Launch Resco Cloud Dashboard - Install Resco MobileCRM Client	2023

Enhancement	Description	Version
Australian Telephone Numbers Formatting	**MobileTech now displays Australian telephone numbers without the United States formatting.** This is determined by the mobile device's localization. Australian phone numbers will now display without any formatting. For example, 12345678901234. If the telephone number is 14 characters long and the extension is 0000, these four characters will be removed. (For example, 12345678900000 will display as 1234567890.) The following areas display the updated telephone number format: * Additional Work Form * Location Contact Form * Location Contact List	2023
Updated the Password Policy Window	We've updated the Password Policy window to help clarify the Technician Password Expiration Policy section. Set up when you'd like all technician passwords to expire, which would require each technician to set up a new password that conforms to your password complexity. To check the current value, navigate to User via the Resco Cloud Dashboard Admin Console. Additionally, the default value for the Password Expires field is now set to Never. (Previously this value defaulted to Next Logon.)	2023
MT Admin: Create New Call for Bill Only Locations Setup Option	A CreateNewCallForBillOnlyLocations setup option has been added to the Service Call Settings section in MobileTech Admin Setup Options. This is a new setup option that, when set to True, allows technicians to create new service calls for locations marked as Bill Only in Service Management. Additionally, the bill only customer locations have an indicator displayed next to the location name. The default value is False, which means the Bill Only locations do not appear in the lookups in MobileTech and technicians are not able to create new service calls for Bill Only locations. We have also added a new "isbillonly" field to the location table. With this option set to True, the indicator is displayed next to the location name.	2023
MT Admin: Set Appointment Details on New Call has been moved to the Service Call Settings Section	The SetAppointmentDetailsOnNewCall has been moved to the Service Call Settings section. Previously this was a line that needed to be added to SQL. The SetAppointmentDetailsOnNew Call option determines if technicians can add appointment information on a new call. The default value is True. If you do not want to display the Appointment Details to display on the New Call form, you can update this setting to False.	2023

Enhancement	Description	Version
MT Admin: New Auto Open Form Settings	A new Auto Open Form Settings section has been added to MobileTech Admin Setup Options. Previously this was manually updated in Offline HTML. When enabled for any of the lists mentioned below, when a technician selects a list tab, if the list has no items, the form to create that item displays automatically. The form auto-open happens the first time you navigate to the corresponding tab within the same instance of the Appointment Completion form. The functionality has been added to the following lists. By default, this has been enabled for the Inventory, Purchase Order Detail, and Time Entry (from the Appointment Completion form) lists. * Additional Work * Attachment * Change Order * Change Order Detail * Meter Reading * Note * Refrigerant	2023
MT Admin: Sync Maintenance Moved to Device Global Settings	The UseSyncMaintenance has been moved to the Mobile Device Global Settings section in MobileTech Admin Setup Options. The setup had previously been manually set up in Offline HTML. The UseSyncMaintenance option is used to help prevent issues with users having multiple devices by displaying a sync prompt automatically on the device if the user hasn't synchronized their device after the SyncInterval value (hours). You can also set the CheckInterval (minutes) that determines how often MobileTech checks to see if the SyncInterval has been reached. Once the technician syncs the device, the Sync Interval resets. If the technician selects Cancel on a sync reminder prompt, this is logged in the JSBridge file on the device. The log file includes the date and time that Cancel was selected. The log file can be sent and you will be able to see if the technician was not syncing when they were prompted.	2023
MT Admin: Allow Delete TimeIn has been moved to the Time Log Settings	The AllowDeleteTimeIn has been moved to the Time Log Settings section in MobileTech Admin Setup Options. This setup option previously need to be disabled/enabled in Offline HTML. The AllowDeleteTimeIn option determines if technicians are able to delete a time-in for a job/service appointment and technician activities. The default value is True. Select False if you do not want your technicians to be able to delete a time-in from their mobile device.	2023

Enhancement	Description	Version
MT Admin: Use PO Event Based Sync has been moved to the Purchase Order Settings Section	The UsePOEventBasedSync has been moved to the Purchase Order Settings section in MobileTech Admin Setup Options. Previously this needed to be manually enabled in Offline HTML. The UsePOEventBasedSync option determines if event-based syncing is used to sync to the host after a purchase order line is created. The default value is False. If set to True, this option also requires that UseEventBasedSync is set to True.	2023
MT Admin: Use Time Log Background Sync has been moved to the Time Log Settings Section	The UseTimeLogBackgroundSync has been moved to the Time Log Settings section in MobileTech Admin Setup Options. Previously this needed to be manually disabled in Offline HTML. The UseTimeLogBackground Sync option determines if the technician's coordinates are automatically uploaded to the audit_timelog table with a background sync to the middle-tier anytime they time in, time out, or delete a time-in. The default value is True . Select False if you do want the coordinates automatically uploaded to the audit_timelog table. This option is disabled if UseTimeLog is set to False.	2023
MT Admin: A Set Caller Details on New Call Setup Option has been Added	A SetCallerDetailsOnNewCall setup option has been added to the Service Call Settings section in MobileTech Admin Setup Options. The new SetCallerDetailsOnNewCall setup option determines if the caller detail fields are enabled on the New Call form. The caller detail fields include Caller Name, Caller Email, and Caller Phone. The default value is False. Select True to enable these fields.	2023
MT Admin: A Round Initial Time In/Out Setup Option has been Moved to the Time Log Settings	A RoundInitialTimeInOut setup option has been moved to the Time Log Settings section in MobileTech Admin Setup Options. Previously this was manually set up in Offline HTML. The RoundIntialTimeInOut setting determines if rounding is applied to the initial Time In and Out values instead of using actual time. The default value is False, which indicates that the actual time is used when the MobileTech user initially times. When set to True, the initial values are rounded based on the TimeLogRoundingInterval setting.	2023

Enhancement	Description	Version
MT Admin: Quadra Integration setup has been moved to MobileTech Admin	The Quadra Integration setup has been moved to MobileTech Admin in MobileTech Admin Setup Options. Previously this had been a multi-step manual setup. The MobileTech/Quadra integration allows field technicians to generate Quadra recommendations directly from the MobileTech appointment completion process. Technicians can then view that recommendation from within ERTH's Quadra mobile application and turn that into field quotes and future service call work in Signature/MobileTech. Once you save the Setup Options window after setting up the integration, the following Quadra Objects are created: * View: FTQuadraRecommendationTemplateLookup * Trigger: QuadraRecommendationTemplateTrigger * Stored Procedure: WSMobileLoadQuadraRecommendationTemplate	2023
MT Admin: An All Previous Week Entries Setup Option has been Added to the Mobile Device Global Settings	An AllPreviousWeekEntries setup option has been added to the Mobile Device Global Settings section in MobileTech Admin Setup Options. This new option provides the ability to limit technicians to entering time for the current week only. The default value is True. * True: Technicians are able to create and edit time entries for the previous week. * False: Technicians can only enter time entries for the current week.	2023
MT Admin: LogError setup option has been Added to the MobileTech Global Settings	A LogError setup option has been added to the MobileTech Global Settings section in MobileTech Admin Setup Options. This new option determines if MobileTech errors are emailed to the AdminEmailAddress as well as saved in the Event Log. The default value is set to Event Log and Email Admin, errors are saved to the event log and emailed to the AdminEmailAddress. If set to Event Log Only, the errors are saved only to the Event Log and no emails are sent.	2023
MT Admin: A Show Related Appointments On Completion Setup Option has been Added	A ShowRelatedAppointmentsOnCompletion setup option has been added to the Service Call Settings section in MobileTech Admin Setup Options. This new option allows technicians to view related appointments for the service call or job, regardless of the assigned technician from the Appointment Completion form. Technicians can also access related appointments from the Appointment form on the Related tab. The default value is True. * True: The Related Appointments button is displayed on the Completion form. * False: Technicians do not see the Related Appointments button on the Completion form.	2023

Enhancement	Description	Version
MT Admin: An Include All Call Notes with History Setup Option has been Added	An IncludeAllCallNotesWithHistory setup option has been added to the MobileTech Company-Specific Settings section in MobileTech Admin Setup Options. This new option provides the ability to include all service call notes when historical records are requested. The default value is False. A new Other Notes section has been added to the History form The notes are separated by [DATE1 TIME1 - MDFUSRID - Note_Service_Index]. The notes display on the History tab in the Other Notes section. The notes are pulled from the SV000805 table. The Other Notes section displays up to 100,000 characters. If the combined notes in the Other Notes section are longer than the allowed 100,000 character length, the displayed notes are appended with "..." to indicate to the user that the message is too long to display.	2023
MT Admin: Added Allow Create Sub Locations Setup Option	An AllowCreateSublocations setup option has been added to Equipment Settings in MobileTech Admin Setup Options. This new option determines if a technician can create sublocations from their device. The default value is False. Set to True to allow technicians the ability to create unique (for the location) sublocations for equipment. With this set to True, technicians can also edit the description and barcode (if enabled) for an existing sublocation. The AllowCreateSublocations option is enabled if Use Validation for Sublocations is marked in Service Management Service Options. (Microsoft Dynamics GP > Tools > Setup > Service Management > Module Setup > Setup Options).	2023
MT Admin: Added Require Labor for Technician Activities Setup Option	A RequireLaborForTechnicianActivities setup option has been added to Labor Settings in MobileTech Admin Setup Options. This new option provides the ability to require a labor transaction to be entered before technician activities can be completed. The default value is True. When set to False, the technician can complete the technician activity without having to enter a labor transaction.	2023
MT Admin: Added Allow Reschedule Appointments Setup Option	An AllowRescheduleAppointments setup option has been added to Service Call Settings in MobileTech Admin Setup Options. This new option determines if technicians can change the start date and time of service call appointments and technician activities. The default value is True. ** This setting does not apply to creating new service appointments or technician activities.* ** This setting also does not apply job appointments. The job appointment start date and time cannot be changed.*	2023

Enhancement	Description	Version
MT Admin: Added Two New Setup Options for Auto-Populating the Call Type and/or Problem Type	Two new setup options for auto-populating the call type and/or problem type when creating a new service call have been added to Service Call Settings in MobileTech Admin Setup Options. *DefaultCallType: Determines the default call type for new service calls. The default value is <none>. Select the default call type from the drop-down list of available call types. The only call type not included is MCC. * DefaultProblemType: Determines the default problem type for new service calls. The default value is <none>. Select the default problem type from the drop-down list of all problem types.	2023
Resco Inspections: Added a Warning Icon Indicating When an Inspection Report is Required	We've added a warning icon to indicate when an Inspection Report is required. This displays when the Inspection validation is set to REQUIRED. This icon displays on the following lookup views and applies to Service Call, Job, and Equipment required inspections. * Associated Inspections * Answered Inspections * Completed * Email Reports * In progress or completed * In progress	2023
Additional New Features From Resco's Winter 2022 Release:	* Report Designer user interface improvements: - Design grids more conveniently - Understand properties better * Inspections - Map questions to fields - Buttons can create instances of repeatable groups - Omit unanswered questions from reports	2023

Enhancement	Description	Version
Additional New Features From Resco's Spring 2023 Release:	* Questionnaires - Data mapping in bulk - Multiple images limit - Multiple images display * Reports - Image size - Easy access to variables - Report preview - More control over page size - Clone style * Woodford/platform - Nicer app UI - Form designer UI overhaul - Calendar: week selector - Form localization improvements - Design Size button removed from view editor - Sync download performance tips - Rich text tab and process flow tab technology change - Windows 8.1 app support change	2023

Enhancement	Description	Version
Resco Inspections: New Report Setup Options	We've added new setup options for the Inspection Report to the Report Settings section in MobileTech Admin. * InspectionReportEmailMode: Determines how inspection reports are automatically sent. - Do not send inspection report emails: The inspection report is not automatically sent. The technician can still manually send the report from the device. This is the default value. - Send when inspection report is first created: Sends the inspection report when the technician syncs after creating the report. - Selected or entered by technician: Sends the inspection report(s) related to an appointment when the appointment is completed to the designated recipients in Inspection Email Options. The technician can also select one or more Contact email addresses to send the inspection report(s). The technician can also enter new contacts and customers' email addresses. * ReportEmailAttachmentMode: Determines if multiple attachments are included in one email upon appointment completion. This option is enabled if InspectionReportEmailMode is set to "Selected or entered by Technician". - Send individual emails per report attachment: Attaches only one inspection report per email when the appointment is completed. If multiple inspection reports exist for the appointment, an email is sent for each inspection report. This is the default value. - Combine inspection attachments to one email: Attaches all inspection reports related to the appointment when the appointment is completed. - Combine all report attachments into one email: Attaches all inspection reports and the call, appointment, and/or job appointment summary reports related to the appointment when the appointment is completed. This option does not include field invoices. Field invoices will be sent as a separate attachment.	2023
Resco Inspections: Added Wild Card Character Functionality to Appointment and Inspection Linking	We've added wild card character functionality to appointment and inspection linking in Offline HTML if you (optionally) limit to a specific value such as a service call type or equipment type. This would provide you with the ability to group similar entities. The wild card character's default value is %, however, you can edit this by updating the wildCardChar variable value found in utility\questionnaire\link-appointment.js. This wild card character can be used on any field for the service call, job, or equipment.	2023

Enhancement	Description	Version
Resco Inspections: Inspection Source drop-down list is sorted alphabetically	When setting up Inspection Email Options, you will now find that the Inspection Source drop-down list is sorted alphabetically for the templates that you've added in Resco Cloud. Note that the COMBINED ATTACHMENT EMAIL and SERVER EMAIL DELIVERY options remain pinned to the top of the list. You can also type the first few letters of the template name to navigate to that section of the list as well as auto-fill the Inspection Source field.	2023
Technicians can now view open service calls in the Call History	Technicians can now view open service calls in the Call History form by selecting the new Include Open Calls checkbox. Prior to this new feature, only completed or closed service calls displayed.	9.0
View Fault Details for equipment before creating a service call	Users can now view the Fault Details for equipment before creating the service call or service request. The Fault Details view includes the fault name and priority and fault status icons. Faults are sorted to display "In fault" rules at the top of the list and then sorted by Priority. Users can narrow the displayed list by searching for any displayed information (like status, etc.). Select the fault to display the timestamp, description, issue type(s), status, system effect, and recommendations. From the specific fault display, users can create a service call or service request for that fault, or they can close the view to proceed without creating a call/request	9.0
Service Area added to MT Schema	Service Area has been added to the MobileTech Schema for custom needs. The read-only servicearea field (limited to 15 characters) is now available on the Location table.	9.0
New Appointment Details Section on Service Call Form	We've added a new Appointment Details section to the New Service Call form where technicians can add the appointment start date, estimated hours, description, and status. * Start Date: The default date is the current date/time. * Estimated Hours: The default value is 1 and can be incremented by .25. The minimum value is 0 and the maximum value is 999999. The decimal value displayed is 2. * Description: The maximum length is 50 characters. * Status: The default value is DEFAULT. The COMPLETE and DEFAULT values do not display as a status to select in the drop-down. - If AutoStatusUpdate is set, this will be the status that defaults in this field. - If TimeLogStatusUpdate is set, while this status is available in the status list, when selected, technicians will be prompted to synchronize their device.	9.0

Enhancement	Description	Version
Refrigerant Tracking added to appointment validation	We've added refrigerant tracking to the appointment validation that applies only if: 1. UseRefrigerantTracking = True 2. The service call has equipment assigned to it where the equipment has a Refrigerant Equipment Type other than 0 - Not Applicable. 3. The service call does not have any refrigerant tracking records for at least 1 of the assigned pieces of equipment. If more than one pieces of equipment matches the requirements, when Add Refrigerant Tracking is selected, the Service Call form opens to the Equipment tab. The user will need to select the equipment from the list and go to the Refrigerant tab to enter and save the refrigerant information. When completing the appointment, Add Refrigerant Tracking now displays in the Missing Recommended Data window. This validation checks if the current user has not entered a refrigerant tracking record for at least 1 of the assigned equipment on the service call. Users can still select to complete the appointment without entering the refrigerant information. * If only one piece of equipment is on the call with the appropriate requirements, when Add Refrigerant Tracking is selected, the Equipment form opens to the Refrigerant tab where users can enter and save information. * If more than one piece of equipment matches the requirements, when Add Refrigerant Tracking is selected, the Service Call form opens to the Equipment tab with the equipment displays. The user will need to select the equipment and then select the Refrigerant tab to enter and save the refrigerant information.	9.0
MT Admin - Send Test Email	In MobileTech Admin, we've added a Send Test Email button in the Setup Options window so that you can test your SMTP server settings in the Report Settings section. If successful, a "Test Email sent to Admin Email Address" message displays. If unsuccessful, an error message displays the system error(s). The email layout is as follows: From: if UseSMTPAuthentication then from SMTP username, otherwise AdminEmailAddress To: AdminEmailAddress Subject: MobileTech Admin Test Email Body: You have requested to send this test email from MobileTech Admin.	9.0

Enhancement	Description	Version
Event Based Syncing Changes	Event -based syncing now includes creating equipment and adding purchase order lines. After saving the equipment or purchase order, technicians are prompted to sync their device if they have UseEventBasedSync turned on.	9.0
Prevent Technicians from creating Appointments	If you do not want your technicians to be able to create appointments in MobileTech, you can remove the Create permission from the Appointment entity in the MobileTech Woodford project	9.0
Updates To Employee Middle Tier Table	The departmentid and positionid read-only columns in the middle-tier Employee table are now populated during a Load Data or integration sync.	9.0
Technicians can view historical Task Responses on MCC calls	Technicians can now view read-only historical task responses on an MCC (maintenance contract computer-generated) service call from the Task form by selecting the new Task Response History tab and then selecting the Redisplay icon within the expanded section to retrieve the task response history. Internet connectivity is required. This displays the task label and response for historical service calls on the contract. The number of historical service calls displayed is determined by the MobileTech Company-Specific Settings setup option HistoryCount . The technician can collapse/expand the entire list or individual service calls. The historical responses remain on the device until the next device sync. **This option requires internet access**.	9.0
Related Tab: Technicians can see other technicians assigned to the same service call or job	We've added the ability for technicians to see other technicians scheduled for the same service call or job by selecting the new *Related* tab on the Appointment form and then selecting the Redisplay icon. Technicians can see the appointment status, technician name, appointment date/time, appointment description, and completion date. The list of appointments can be sorted by start date or appointment and/or the list can be filtered. **This option requires internet access.** * Service appointments automatically show all appointments on the service call. * Job appointments show only the appointments for the selected date range. The default date range is +/- 1 day. You can select any date range, however, be aware the larger the range the longer it may take to retrieve the data.	9.0

Enhancement	Description	Version
Use Replacement Parts option in Equipment Settings	We've added a UseReplacementParts option in Equipment Settings to utilize replacement parts that are added to equipment in Signature. When set to True, the Parts tab is added to the Appointment Completion form for service appointments. When selected, replacement parts are listed and grouped by equipment assigned to the service call. The technician can select and add the replacement part as an inventory transaction. The information displayed on the Replacement Parts form includes the item number, description, quantity needed for replacement, and unit of measure. The quantity refers to the quantity added for the replacement part in Signature. Replacement parts for equipment are added in the Replacement Parts window in Signature. If UseReplacementParts is **true**, then UseTaskMaterials in the Task Settings section must be **false**.	9.0
Track the time and mileage taken to travel to or from an appointment	We have added the ability to track the time and mileage taken to travel to or from an appointment. Travel can be started, paused, ended, or deleted. This option is available if UseLabor, UseTimeLog, and UseTravelTimeLog are all set to True in MobileTech Admin. Depending on setup: * Travel can be required before a technician can work on an appointment. * The technician can be automatically timed in to the appointment when ending travel. * The appointment status is automatically set when beginning or ending travel. * Minimum travel time and mileage can be set.	9.0
Added the Six User Defined fields to the Equipment Form	We've added the six equipment user-defined fields to the bottom of the Equipment form. This includes the user-defined 1-5 (char(31)) and user-defined 9 (datetime) fields.	9.0
New Attachments Tab on the Time Entry Form.	Technicians can now add attachments to any labor expense transaction from the new Attachments tab on the Time Entry form. The transaction does not have to be saved before the attachment is added. The attachment name includes the transaction number. If the transaction is not fully saved or deleted before being synced, the attachment is also deleted. Once the device has been synced, the attachment is available in the Signature Time Card Entry window and attached to the transaction number. When adding work crew transactions, if an attachment is added at the initial creation of the time entry, the attachment is only added to that transaction. After the work crew time entries have been created, an attachment (same or different) can be added to each transaction.	9.0

Enhancement	Description	Version
Technicians can update their own passwords on their device	Technicians can now update their own passwords via devices when set up in the Resco Admin Console. Password reset policies can be enforced on a timed basis (30, 90, 180 days, or 1 year). You have the option to require technicians to create their own password in MobileTech after they've entered the temporary password that you've assigned. You can assign a different password to each technician or you can assign the same password to multiple technicians.	9.0
New Contract Indicator displays to left of Equipment	We've added a contract indicator that displays to the left of equipment that indicates the equipment is on a contract. This icon displays on the Location Equipment tab, Service Call Equipment tab, New Service Call form, and the BOB Equipment dashboard.	9.0
MCC Service Call Task Notes now available for review in the Task Form.	MCC (maintenance contract computer-generated) service call task notes are now available in the Task form as read-only. The technician can select the Task Note tab to expand the form to view the note.	9.0
Custom statement above signature form in Technician Timesheet	You can now add a custom statement that displays above the signature box on the Timesheet Signature form and is displayed on the Time Sheet Report. The character limit is 4000 characters. Keep in mind that longer statements will require technicians to scroll through the statement on their devices. To use this feature, you will need to deploy the updated Timesheet report.	9.0
Add attachments to Service Call and Job Appointments	Users can now add attachments to service and job appointments. The attachments are available in Signature at the appointment level.	9.0
Users can select the Building ID and Room	On the Equipment form, users can now select a different Building ID and can enter a Building Room.	9.0
MT Admin - Audit and Log Synchronization now enabled by default.	Auditing and Log synchronization events are now enabled by default in the MobileTech Woodford project. These options are both needed to populate the Sync Dashboard.	9.0
Sync Prompt now defaults to enabled	The sync prompt now defaults to enabled with the sync interval set to 4 hours and the check interval is 15 minutes. The prompt automatically displays on the device if the user hasn't synchronized their device within 4 hours with a check interval set at 15 minutes. After the tech syncs, the sync interval is reset.	9.0
Support Email field in Branding Section of Woodford Project defaults to "Blank"	The Support Email field in the Branding section of the MobileTech Woodford project now defaults to blank. When technicians select Email Log Files in the MobileTech About window, this is the email address that defaults to the device's email client. If the Support Email field is left blank, the technician will need to enter the recipient email.	9.0

Enhancement	Description	Version
For inactive customers, users can no longer create a new service call	For **Signature 18.04b06** or higher, when the customer record is marked as inactive in Signature, users can no longer create a new service call for any of the customer's locations. If the customer is inactive, none of their locations will display on the New Call form. If you are using the Building Optimization Broker integration, when you select equipment for an inactive customer, Create Service Call and Create Service Request are removed from the list of action items. New appointments can still be created from existing service calls.	9.0
Technicians can now delete a "Time-In" for a job appointment or activity.	Technicians now have the ability to delete a time-in for a job appointment or technician activity. Technicians are asked if they want to manually update the appointment or activity status. Technicians have the option to manually update the status. This is only available if the technician has not synced their device.	9.0
Update to various task responses.	When saving responses for Yes/No, Integer, or Numeric task responses, the taskresponse.dateresponse value is set to the current date to indicate that a response of None or 0 (zero) is a valid response. Previously, the responses that were set to None or 0 were read as a non-response.	9.0
Changes to Service Call History if technician is no longer active	When viewing service call history in MobileTech, if an employee is no longer an active MobileTech employee (and an active TimeTrack user), the Signature Employee/Vendor ID (gptechnicianid) now displays. Previously, if the technician was inactivated, the Employee information was blank.	9.0
Option for Cost Code Summary reports and inspection reports to be stored at either Cost Code or Job Level.	We’ve added the ability to choose if you want the Job Appointment Summary Report and Inspection Reports to be stored at the Cost Code or Job Level. A new setup option JobAppointmentAttachmentLocation has been added to the Resolutions Settings Setup Options. You can select where you want to attach the Job Appointment Summary Report and Inspection Report in Signature. The default value is Job and attaches the reports at the job level. Select Code Code to attach the reports to the cost code assigned to the job. The default value is Cost Code.	9.0
JS Bridge Log File Changes	The JSBridge log file located on the device now includes when a technician selects Cancel in the Sync Reminder prompt. This includes the date and time the Cancel button was selected.	9.0

Enhancement	Description	Version

MT Admin: New reports setup options	Two new setup options have been added to Report Settings to provide the ability to turn off the summary reports when service and/or job appointments are completed. The default values are set to **True**.
	GenerateServiceSummaryReport
	If set to False:
	  * The Call Summary Report or Service Appointment Report is not generated when a service
	    appointment is completed.
	  * The list of emails to select to receive the report will not display.
	  * The Technician and Customer signature buttons will not show on the Summary tab.
	GenerateJobSummaryReport
	If set to False:
	  * The Job Summary Report is not generated when a job appointment is completed.
	  * The list of emails to select to receive the report will not display.
	  * The Technician and Customer signature buttons will not show on the Summary tab.
		9.0

Lat/Long data now captured when TImeLogform is initially opened.	Latitude and longitude data is now captured when the TimeLog form is initially opened for Time In/Time Out and for Travel Time Log if the device has GPS capabilities and a value is returned. This information resides in the timelog table in the MobileTech Middle Tier. The fields are gptimein_latitude, gptimein_longitude, gptimeout_latitude, and gptimeout_longitude. GPS information cannot be edited on devices. If the travel time log is transferred, the original latitude/longitude values are used. Transferring the travel time log does not update the values.	9.0
Updates to how text fields display on Forms and updated Date Time Minute drop-down.	We've updated how text input fields display on forms. Text input fields now contain descriptive text to help identify that these fields are editable and where to tap to add the text. Most text input fields display "Enter <field label>". On the legacy Job Safety Tasks form, the text fields display "Enter Response". We've also updated the Date Time Minute drop-down to increment by 1 minute. Previously this was limited to a 5-minute increment. You can edit the minute increment value in the MobileTech Woodford file.	9.0
Technicians can now add an attachment when completing a service appointment	When completing a service appointment, technicians can now add an attachment to the service call, appointment, or equipment associated with the service call. The attachment is available on the Attachments tab the attachment was added to (service call, appointment, or equipment).	9.0

Enhancement	Description	Version
Equipment tab added to the Appointment Completion Form	We've added the Equipment tab to the Appointment Completion form. When selected, technicians can view equipment associated with the service call. Equipment can also be associated with the service call from the Equipment tab. Equipment can also be associated with the service call from the Service Call form.	9.0
Added a Today's Appointments view to the Appointments list	We've added a Today's Appointments view to the Appointments list. Technicians can select Today's Appointments to view only the appointments for the current day.	9.0
Changes to Appointment Completion Form	From the Appointment Completion form, when a technician selects one of the following tabs that opens a list that currently has no items, the corresponding form opens automatically so the technician can add that item: Time Entry, Inventory, or PO Detail tab. Previously, after selecting the tab, the technician would have to click the Add icon to open the form to create the item. The functionality has been added to the following lists but defaults to disabled (false). You can enable this in Offline HTML for each list by setting the variable autoOpenNewForm to true. Likewise, you can disable this for the Time Entry (from the Appointment Completion form), Inventory, and/or PO Detail lists by setting the variable to false. * Additional Work * Attachment * Change Order * Change Order Detail * Meter Reading * Note * Refrigerant	9.0
Technician add/edit comments on the task form	Technicians can now add or edit a comment on the Task form. The new Comment field has a 120- character limit and is found in the Task Details section below the Description field. The Comment field is available with or without task responses set up for the task.	9.0

Enhancement	Description	Version

MT Admin: New password options	We've added the ability to set up your password complexity requirements, password expiration, and lockout mode in MobileTech Admin. While you can manually add the technicians' passwords in MobileTech Admin or in Resco's Admin Console **Passwords with Admin Console** (optional), you can use the Update Password Policy window to set up the complexity, password expiration, as well as the lockout mode. In MobileTech Admin, select Tools > Update Password Policy.
	* When MobileTech users and administrators update their passwords, the password complexity is enforced.
	* The password expiration applies only to MobileTech users, not to MobileTech administrators.
	* If you've previously set up password complexity and lockout policy using Regex, those values will default into this window.
	* If you do not have a password complexity set up, the Update Password Policy window automatically displays after these events:
	    * Add Company Objects
	    * Add/Update Organization Database
	    * Change Administrator Password
	    * Upgrade Resco Server
	We recommend enabling all requirements and setting the minimum password length to 8 characters.
	If you do not have a password complexity set up, the Update Password Policy window automatically displays after these events:
	* Add Company Objects
	* Add/Update Organization Database
	* Change Administrator Password
	* Upgrade Resco Server
		9.0

Enhancement	Description	Version

Purchase Orders supported in Job Appointments. No includes additional setup options.	Technicians can now enter purchase orders on job appointments. We've added/updated the Purchase Order Settings section in the MobileTech Admin Setup Options window so that you can enable/disable the ability to add a purchase order to service and/or job appointments. The other remaining fields have not changed.
	* **UsePurchaseOrderService:** Determines whether the PO Line tab is available when completing service appointments. Technicians can use that tab to enter purchase orders. This defaults to True for new installations and retains the existing setting for UsePurchaseOrder if upgrading.
	* **UsePurchaseOrderJob:** Determines whether the PO Line tab is available when completing job appointments. Technicians can use that tab to enter purchase orders. This defaults to True for new installations and if upgrading retains the existing setting for UsePurchaseOrder.
	* **PurchaseOrderValidationLevelService:** The level of requirement for entering purchase orders before completing a service appointment. The default value is OPTIONAL for new installations and retains the existing setting for PurchaseOrderValidationLevel if upgrading.
	   * **OPTIONAL –** Technicians do not need to enter purchase orders before completing appointments and are not prompted to enter them.
	   * **WARNING –** Technicians are prompted, but not required, to enter purchase orders before completing appointments.
	   * **REQUIRED –** Technicians must enter at least one purchase order before completing appointments.
	* The job appointment summary tab has been updated to include a purchase order section.
	* The Job Summary report has been updated to display a Purchase Orders section if PO lines exist for the job appointment.
	* Use the Mobile Purchase Order window in Signature to process the purchase order added to a job appointment as you would if the purchase order was added to the service appointment.
		9.0

Added a new Transaction Origin parameter for Purchase orders.	If you have updated to the latest **Signature release (18.05b07)**, when you upgrade to MobileTech 9.0, the wsiMoblePurchaseOrderWork stored procedure will include a new @I_vTRX_Origin char(13) parameter that contains the value "MobileTech". This value corresponds with a new TRX Origin column in the Process Mobile Purchase Orders window in Signature.	9.0

Enhancement	Description	Version
MT Admin: New audit table	We've added an audit table named WSMobileTechAdminAudit containing information about which machines have MobileTech Admin installed. The table includes the machine name, installation date, installation by, and installation version.	9.0
Auto status update applies to both Job and Service Appointments	The AutoStatusUpdate setup option in Mobile Device Global Settings now applies to both job and service appointments. This setting determines the default status for appointments that are received by the device. The default value is blank, which means no status is assigned to the appointments.	9.0
Technicians Lat/Long Coordinates automatically uploaded to new audit table	Technicians' latitude and longitude coordinates now automatically uploaded to the new audit_timelog table with a background sync to the middle-tier any time they time in, time out, or delete a time in. If you are using Travel Time Log, the coordinates automatically upload when travel time begins, pauses, resumes, ends, or if the travel time is deleted. Some of the fields in the audit_timelog table include the name of the event (Time In, Time Out, Delete Time In, Begin Travel, Pause Travel, Resume Travel, Delete Travel, and End Travel), the service call ID, job number, appointment ID, employee ID, time in, time out, and latitude/longitude. The audit_timelog table has been added to the clean-up job and only keeps entries that were modified in the last 21 days, which is the same functionality as the timelog. You can disable this feature by accessing Offline HTML in the Woodford file. Go to Entity > timelog and edit timelog-form.html. Set useTimelogBackgroundSync to false. Save and publish the project.	9.0
Changes to Job Appointments notes tab	When viewing the Job Detail for a job appointment, the Notes tab now includes all job notes including job, job cost code, change order, and job appointment notes. The Note tab is now always displayed, regardless of having a note attached. On the Note List, the note subject, creator, and date created as well as what the note references (note types (blue letters), appointment number, change order ID, job number, and job cost code) are displayed. Only the change order note can be edited. The job, job cost code, and job appointment notes are read-only.	9.0
Changes to setup option for Non-Inventory items in Purchase Orders	We've added a new setup option to the Purchase Order Settings section called UsePONonInventoryItems. When set to True, this setting allows users to enter non-inventory items to purchase order lines. This defaults to True. Originally UseNonInventoryItems in the Inventory Settings section allowed your technicians to enter non-inventory items when completing appointments and adding to purchase order lines. The Inventory Setting now only applies when completing an appointment.	9.0

Enhancement	Description	Version
Shortcut on Home Screen for Purchase Order line entry	You can now add a shortcut to the Purchase Order Lines list on the home screen. When selected, the PO Lines list displays all purchase order lines on the device. The information included in the list is the purchase order number, vendor, item number, item description, site, quantity, unit, and date as well as the associated appointment ID, service call ID, or job number. Only the technician's appointment purchase orders display in the list. If the purchase order has not been synced to the back office, the technician can click on the PO line and then select Add PO Line to open the PO Line form to complete the new purchase order line. If the purchase order line has been synced, a message displays indicating that the purchase order cannot be modified. However, the technician can create a new purchase order line for the appointment by selecting the + icon to open the PO Line form and selecting the appointment. The PO Line form is completed as it was before.	9.0
Search for the customer number/ name in the Field Invoicing Customer Setup window	We've added the ability to search for the customer number or customer name in the Field Invoicing Customer Setup window.	9.0
Enter Site Name toggle to the PO Line form	We've added the Enter Site Name toggle to the PO Line form if the technician has sites assigned but no inventory available for the site. The technician will need to enter the item number and description manually but can now have the option to select an assigned site instead of manually entering the site name.	9.0
Resco Inspections: Technicians can view all inspection reports related to an entity	Technicians can now view all inspection reports related to an entity including those created by other technicians within a selected date range if an internet connection is available. On the Inspection Reports list, we've added date range selectors and a Refresh icon. The date range defaults to the filter of the current week and the previous week. The technician can enter a date range and then select the Refresh icon to view all related inspection reports that have been created by any user, not just for the current user. The inspection report list has been updated to include the date the inspection report was created, the user who created the report if an online fetch was performed, and the appointment ID if accessing the reports from the Service Call form. **This applies to the following forms:** * Additional Work * Customer * Location * Equipment * Service Call (including inspections for appointments on the service call)	9.0

Enhancement	Description	Version
Resco Inspections: Import a separate Woodford Project	Users can now import a separate Woodford project that has Inspections enabled called MobileTech with Inspections 9-0-xx.woodford. This includes having branch/team entities enabled, Inspections is added to Home and Appointment forms. You will need to assign the Inspector Role in MobileTech Admin to any technicians who will be using * Inspections (and the optional Job Safety Analysis. * For branch/team filtering, you will still need to complete the steps as outlined in Limit Inspections to Technician Teams and/or Branches.	9.0
Resco Inspections: Changes to Inspection Manager web app and Schedule	In the MobileTech Inspection Manager web app and Schedule, we now pull the technician's phone number from the K2A_ResourceExtension table, if available. The technician's phone number entered in Schedule (Administration > Resource Options) auto-populates in the Mobile Phone field in MobileTech Inspection Manager web app (Technicians > select Technician). You will need to Load Data in MobileTech Admin (Tools > Load Data) to update the telephone number in the MobileTech Inspection Manager web app. If you update the technician's phone number in Resco Cloud, this will not update the phone number in Schedule.	9.0
Resco Inspections: Limit to filename	The inspection report filename is limited to 51 characters (this includes any appended date or timestamp information and the MIME type ‘.pdf’) to match the settings in Signature. If the Inspection Report name exceeds 51 characters, the Inspection Report annotation entity fails with the sync error: String or binary data would be truncated.	9.0
Resco Inspections: Link an inspection to ALL appointments or equipment	You now have the option to link an inspection to all service appointments, all job appointments, and/or all equipment assigned to service appointments. This link is used to add an inspection to the appointment completion validation. Validation levels can be REQUIRED or WARNING. With REQUIRED, the inspection is required to complete the appointment. With WARNING, a technician can still complete the appointment without the inspection. Setting this up requires updating the link-appointment.js script in the MobileTech with Inspections Woodford project. You can limit the inspection to specific types of service appointments and/or equipment by adding the schema field name and value.	9.0
Resco Inspections: From the Equipment form, all Inspection reports now available for a piece of equipment	From the Equipment form, when viewing the inspection reports for a piece of equipment, all inspection reports will now be available, including those created by other technicians. Previously only the inspection reports for the current and previous week were available.	9.0

Enhancement	Description	Version
Resco Inspections: Tech select location contact to send reports during appointment completion process	Technicians can now select location contacts to send inspection reports to when completing the appointment. The Inspection Report Emails form is accessed just like the Summary report emails form, during the appointment completion process after selecting the checkmark. The inspection report is sent to the selected location contacts, the technician, and to the distribution list as set up in the Inspection Email Options window in MobileTech Admin. On the Inspection Report Emails form in MobileTech, all inspection reports created for the appointment are listed. The technician can expand the inspection report to view a list of the location contacts and then select the contacts to send the inspection report. Only one report attachment is sent per email. For example, if the technician created two inspection reports and selects the same location contact for each report, the contact will receive separate emails for each inspection report. As with the automatic sending of the inspection report, in Report Settings, ReportEmailMode must be set to "Selected or entered by Technician" and in Inspection Email Options, the specific inspection report must be set up. To disable the technician's ability to select location contacts for the inspection report, but still automatically send the report as set up in the Inspection Email Options window, you can set the Offline HTML variable 'sendInspectionEmailOnCompletion' to false in the entity > location contact > reportcontact-list.js. JSA (Job Safety Audit) Inspection reports do not display in the Questionnaire Report Emails form as there is already automated logic available.	9.0
Resco Inspections: Tech name auto populates in JSA Form	On the Job Safety Analysis Inspection form, the Technician name now auto populates in the signature section. Technicians no longer have to manually enter their name.	9.0
Resco Inspections: JSA uses JSON Data Storage option	We've updated the JSA Inspection form to use the Resco Cloud Summer 2022 Release's leaner JSON data storage option. We've also updated the JSA Inspection form to use versioning as Resco has deprecated the non-versioned inspection templates.	9.0

Enhancement	Description	Version

Resco Inspections: Additional new features from Resco Winter 2021 Release	* Platform
	  * Tree view improvements
	  * Simpler form rules
	  * Pay with Resco (preview)
	  * Add multiple records to the associated view
	  * Integrations improvements
	  * Resco Cloud connector
	  * Web triggers for REST API
	  * Web triggers for OData
	  * Record Type translations support for Salesforce
	  * Support for working with marketing campaign members for Salesforce
	* Inspections
	  * Buttons and reports
	  * Import questions from images/PDF documents
	  * Questionnaire records are easier to reference Platform
		9.0

Resco Inspections: Additional new features from Resco's Spring 2022 Release	* Inspections
	  * Multiselect actions for Questionnaire Designer
	  * Disable automatic reports in Questionnaire Designer
	  * Display all images of multi-image question
	  * Set up report command using Advanced Report Configuration
	  * Create a new record from a lookup question
	  * Reuse answers more effectively
	  * Disable immediate filtering in Result Viewer
	  * Export with question labels, not IDs
	  * Default value for Image/Media question
	* Tagged images on forms
	* Resco Cloud authentication options
	* Woodford command-line interface (CLI)
	* Woodford GitHub integration improvements
	* Debugger port change
		9.0

Enhancement	Description	Version
Resco Inspections: Additional new features from Resco's Summer 2022 Release	Inspections * Leaner JSON * Change group labels using rules * Tweaks to the Yes/No question * Static image size * UI: Switching between groups & group icons * Custom commands for Button components * Grid layout editor improvements * Reorder uploaded images * New deprecations	9.0
Additional new features from Resco's Autumn 2022 Release	Inspections * Improved grid layout editor * Restrict image/media actions * Restrict image/media display size * Smart styles for yes/no questions * Select language for questionnaire reports * Dynamics backend integration improvements	9.0
Support for multiple time entries on technician activity appointment	Users can now create multiple time in/out labor entries before completing a technician activity appointment. A new Time Entries tab displays at the bottom of the Technician Activity form. When the technician activity is completed, the actual hours are the sum of all labor entries. The technician activity can be completed by selecting Complete from the appointment list or form or by selecting Complete from the Appointment Status drop-down in the Time Out form. If the user attempts to complete the technician activity before a labor entry is made, the Labor Entry form displays, and the appointment status is set to Complete when saved. Prior to syncing the device, the user can reopen the completed technician activity by deleting the time entry from the Time Entries window.	8.6
MobileTech Admin - administrator privileges	In MobileTech Admin, any SQL user who has system administrator privileges ("sysadmin") can now perform any previous "sa" user items such as installing database objects and creating the middle tier database. Note that the "sa" password is still required when installing/upgrading MobileTech.	8.6
Updated the Load Data performance	Updated the Load Data performance so that the process loads technician data in batches of 5 in MobileTech Admin. As the technician data is loaded, the check box is unmarked.	8.6

Enhancement	Description	Version
Refrigerant Tracking updates	Added the Refrigerant Equipment Type field to the Equipment form if UseRefrigerantTracking is set to true. When the Refrigerant Equipment Type field displays any option other than 0 - Not Applicable, two additional editable fields display; Optional Charge and Refrigerant Type. Users can enter the information here or from the Refrigerant Tracking tab.	8.6
Xoi Deeplinking updates	When UseXOiDeepLinking = True, the XOi hyperlinks will display in all appointments. If the Xoi Deep Linking note does not exist, a message displays "Note for XOi Deep Linking has been created yet."	8.6
Appointment resolution note updates	An appointment resolution note will now always be created regardless of the UseAppointmentResolutionNote setting. When the appointment is completed, and the device is synched, if UseAppointmentResolutionNote = false then two note entities are created. These notes are available in Signature on the service call resolution note and now added to the appointment note. On the service call resolution note, in addition to displaying the date, time, and technician, the appointment ID is also shown.	8.6
Updates to "Inactive" customer locations	For Signature 18.04b06 or higher, when the service location is marked as "inactive", Signature users can no longer create a new service call for that location. If the location is inactive, the location will not display on the New Call form. If you are using the Building Optimization Broker integration, when you select equipment at an inactive location, Create Service Call and Create Service Request are removed from the list of action items. New appointments can still be created from existing service calls.	8.6
Labor Description field update	The Labor Description field for a technician activity is now limited to 51 characters or less due to a limitation of the Appointment Description field in Signature.	8.6
New Features for Resco Inspections: JSA inspection update	Added a new setup option called JobSafetyValidationLevelJobCost to allow the Job Safety Analysis Inspection to be enforced for a job appointment. The default value is REQUIRED. With this option set to required, the technician must complete the JSA before being able to complete a job appointment. If the inspection is not required, you can set the value to OPTIONAL.	8.6

Enhancement	Description	Version
New Features for Resco Inspections: Manager role	For Resco Inspections users, a new Manager role is available that allows users assigned to this role the ability to see the Manager Dashboard in Resco Cloud. This dashboard includes, but is not limited to, a calendar overview, a general dashboard, Inspection Designer, Mobile Report Editor, Auto Dashboard that displays various information cards related to the selected inspection report, a Result View, and Submitted Reports. **High-level role overview:** -Administrator: Access to all cards. -Inspector/MobileTech: Access to Tools & Settings cards. The Settings options are limited. -Manager: Access to Inspection cards including the Resco App that displays Inspection information cards.	8.6
New Features for Resco Inspections: Job JSA inspection updates	Users can now create a JSA Inspection report for job appointments from the job appointment entity form by selecting the Inspection tab. In MobileTech Admin Job Safety Tasks Setup Options, if the JobSafetyUnsafeStatus is set up and the Inspection report question "Is location safe?" is set to "No", the appointment status will be set to the JobSafetyUnsafeStatus and the appointment cannot be completed. The appointment is removed from the device on the next sync. If the user opens the Job Appointment Completion form at the time of completing the inspection, the Completion form will be closed and the Job Appointment default form will open instead. If the Inspection is completed and the JSA mobile report is run and SAVED, then the resulting report will be attached to the Job Cost Code in Signature.	8.6
New Features for Resco Inspections: Inspection access updates	You can now limit Inspection Report access to a specific team and/or branch. This feature requires you to update the Woodford project and import a pre-defined view.	8.6
New Features for Resco Inspections: Email options for Inspection Report	An inspection report can be emailed in one of three ways, automatic email sent via the server, manual email sent via the server, or manual email sent via the device.	8.6
New Features for Resco Inspections: Enable Tree View folder structure	You can now enable a tree view folder structure that replicates the folder organization set up in Resco's Questionnaire Designer.	8.6
New Features for Resco Inspections: Inspection report update	Added the ability to view an inspection report if it is not associated with additional work, a customer, a location, or a service call. The report can be accessed by selecting Inspections, selecting the Email Reports View, and then selecting the Report icon in the top right corner.	8.6

Enhancement	Description	Version
New Features for Resco Inspections: New Inspection Report views	Added new views that make it easier to determine if the Inspection is "in progress" or "completed". The views that are available are: **Email Reports:** Displays all completed inspections that have a regarding entity with a corresponding location and have the Email button available. **In progress:** Displays all inspections that are open and have not been completed. **In progress or completed:** Displays all in progress and completed inspections. **Templates:** Displays available templates. **Completed:** Displays all inspections that have been completed. Additionally, we've added the regarding entity to display below each Inspection in the view list.	8.6
New Features for Resco Inspections: JSA inspection report update	The Job Safety Analysis Inspection is now automatically saved when the user selects Complete with Report.	8.6
Additional new features from Resco's Summer and Autumn 2021 Releases	**Results Viewer improvements:** -You can configure which columns to see. -Images display as a gallery. -Select/Deselect all questions or entire groups of questions for exporting. **New Component button can be added to inspections as a new type of static component.** **New Questionnaire Wizard that guides you through the most important configuration settings.** **Transform .csv or .xls files into Inspection Templates.** **Add multiple media files within individual questions.** -You can also configure: +Maximum number of images/files (default is 1) +Maximum width/height (images only) +Maximum file size **Inspection forms and Mobile Reports show images and media as thumbnails.** **Grid layout for questions. This can be configured on Properties and set the Layout Type to Grid.** **Command Improvements** **Collapsible Question Groups** **QR Code in Reports** -Generate QR codes from report data and add them to the report. -The report handles QR code as a special type of image	8.6

Enhancement	Description	Version
Resco Inspections	- Users now have the option to use Resco Inspections with MobileTech. With Resco Inspections, you can create custom inspection questionnaires, surveys, and more. Version 8.5 of MobileTech comes with a COVID-19 Health Check and Face Mask Check template. - The Resco Cloud Dashboard now includes the Questionnaire Designer, Results Viewer and Report Designer. - Job Safety Analysis can now be performed using a Resco inspections template delivered in this release.	8.5
Integration to Building Optimization Broker (BOB)	If you are using Building Optimization Broker, you can view the Health Monitor from the BOB dashboard in MobileTech. We've also added a new BOB tab to the Appointment, Service Call, Equipment, Customer, and Location forms.	8.5
Call Description	The Service History window now includes the service call description.	8.5
Filter Call Types	You can now filter the Call Types that display via Offline HTML (through Woodford) for technicians when creating a new service call and/or editing an existing service call.	8.5
Resolution snippet updates	Appointment Resolution Snippets have been updated so that the Add Snippets button is inline in the Appointment pane as the technician completes the appointment. As the snippets are selected, a new snippet preview is displayed in the snippet selection window.	8.0
Unassign equipment prior to sync	Technicians now have the ability to unassign equipment (that they have added) from a service call, provided that a device sync has not been completed.	8.0
Complete an existing and create a new appointment in one step	Updated process for adding a new appointment during the appointment completion process. After selecting the Complete and New Appointment option from the appointment window, the appointment is completed but not synced. When the technician saves the new appointment and syncs, this will also perform a full synchronization that includes the completed appointment.	8.0
View job appointment notes	Technicians can now view all job appointment notes. The Notes tab displays at the bottom of the Job Detail window if notes already exist for this job appointment.	8.0
Service call can remain open with required task completion	A service call can remain open with Task Completion set to Required if a second appointment is created for the service call prior to attempting to complete the first appointment.	8.0

Enhancement	Description	Version
Payment summary redesign	Payment summary for field invoices has been redesigned for technicians to view the payment summary information including invoice number, customer, location, service call number and details of payments that were collected for the service calls, and report totals for the day and week. The Technician information and Date Created are also displayed. Technicians have the option to view the Current Week or the Previous Week. The dates can be sorted ascending or descending. An added option is to Collapse All to view only the date, payment information, and totals or Expand All to view all details.	8.0
Field invoicing signature options	Field invoicing users now have the option to have two different signatures for the Call Summary Report and the Field Invoice Report, depending on setup.	8.0
Contact lookup in Additional Work	A contact lookup button has been added to the Additional Work window so that technicians can select the contact from a list of existing contacts for the location.	8.0
Job appointment contact lookup	Technicians may be able to select a location contact when completing a job appointment. If the job's location is also a service location, the technician can choose a location contact from the provided list or add a new location contact. If the job location is not a service location, the technician can only add a contact's email address to receive the Completion Report and the email address is not synced.	8.0
Appointment completion navigation updates	Technicians can now access the appointment completion functions after selecting the More button. The Complete option has been added to the Hamburger menu icon on the appointment details window.	8.0
XOi Deep Linking integration	Technicians can now use XOi's Deep Linking feature to open the XOi Vision app from MobileTech to complete the XOi Workflow and to view Site History. Technicians can then return to MobileTech from Vision. The Call Summary Report and Appointment Summary reports have been updated to include the XOi Resolution Note when the XOi Deep Linking is set to True in Admin Settings.	8.0

Enhancement	Description	Version
Link to Resco Cloud Dashboard	We've added a link to the Resco Cloud Dashboard under the Tools menu in MobileTech Admin. On the Resco Cloud Dashboard, you have access to: - Woodford: Woodford is a browser-based configuration tool for managing MobileTech. It allows you to manage connected mobile devices and to customize versions of MobileTech dedicated to a particular set of users. - Admin Console: Admin Console is a server administration center used to configure and manage your Resco Cloud server. - Sync Dashboard: Sync Dashboard provides visibility into synchronization performance by identifying sync errors, sync duration, and metrics like average sync time.	8.0
Access to Installation and Admin guide	Admin users can now access the Installation and Administration Guide and the MobileTech Help from the About window in MobileTech Admin.	8.0
Start Sync Date filters are now set up in Woodford and are a global setting	The Start Sync Date filters are now set up in Woodford and are a global setting. The default setting is +/- 1 month. If you need to adjust the Sync Filter range, you will need to update each of the following 3 entities in Woodford: Appointment, Customer, and Service Call.	7.5
Removed two setup options in MT Admin	We have removed two setup options from MobileTech Admin, 'CreateNewCallForAnyCustomer' and 'SyncAllEquipmentRecords'. The introduction of SERVER MODE in MobileTech 7.0 replaces these options and allows technicians to see all permissible customers, locations, and equipment records from the server.	7.5
Updated contact display	We've updated how contacts display: - Location contacts are now grouped by the contact name with their email address and multiple telephone numbers listed beneath the name. - Location contacts displayed in the Appointment Summary Report Emails window display the contact name and the associated email. If an email address is not associated with the contact, the text 'Missing Email' displays beneath the name.	7.5
Call Summary report was updated to make the XOi shared URL more visible	The Call Summary report was updated to make the XOi shared URL more visible.	7.5
Sublocation field added on new and existing equipment form	We've added the Sublocation field to the Equipment form when adding new equipment. This field is also available when viewing existing equipment. If your Signature settings are set up to verify sublocations, a lookup is available. If you aren't verifying sublocations, the field is a simple string field.	7.5

Enhancement	Description	Version
Added ability to submit time entries for approval	Technicians can now submit time entries that require manager approval. Managers approve or reject time entries in TimeTrack. If a time entry is rejected, technicians see a notification on the Time Entry icon that indicates a count of the rejected transactions for the previous and current week. In the time entry list view, a rejected transaction also displays an indicator icon as well as a message that displays "Rejected" and the manager's comment. Technicians can edit their time entry and resubmit from MobileTech.	7.5
Ability to add equipment components	Users can now add components as equipment items to existing Master Equipment. We've also updated the Equipment UI to display component/master equipment information.	7.5
Technicians can now edit the appointment status when timing in or out of an appointment	Technicians can now edit the appointment status when timing in or out of an appointment.	7.5
Equipment attachments	Technicians can now add attachments on the Equipment records within MobileTech. These attachments are added to the Equipment record (paperclip) in Service Management.	7.5
New Woodford Sync Dashboard	A new Woodford feature called Sync Dashboard is now available. This comprehensive monitoring tool gives administrators a 360º overview of sync details including sync errors, how many users have sync errors, average sync length, and more. It also includes a Sync conflict resolution feature.	7.5
SSRS Reports	The following reports have been updated to include new or updated features in MobileTech 7.0. Service Management Reports: - Service Invoice Summary.rdl – New report for the Service Batch Invoicing feature. - Appointment Summary.rdl – Updated the customer and technician signature display. - Call Summary.rdl – Updated the customer and technician signature display. - Field Invoice.rdl – Updated the customer and technician signature display. - Job Appointment Summary.rdl Added the customer and technician signatures. Added the new Job Resolution Note. (Signature 2018 R3 and higher) TimeTrack Reports: - Time Sheet.rdl – Updated the technician signature	7.0
Add Inventory with same Item Number	Technicians can now add multiple service inventory items with the same exact item number provided the description entered is unique.	7.0

Enhancement	Description	Version
Synchronize Contact Changes	MobileTech 7.0 allows technicians to synchronize the contacts they add or update in the MobileTech Client with Signature 2018 R3 (and higher) and the Contacts Management module. The new Mobile Contacts window (Inquiry > Service Management > Mobile Contacts) lets users review and process the customer's contact information.	7.0
Enhanced Signature Capture	The Signature Capture feature has been enhanced and moved to the bottom of the Summary tab. If a signature is missing, the Customer and/or Technician button displays as red. Once the signature is obtained, the button displays as green. If you need more space for a signature, turn the device horizontally to rotate the screen and the signature field displays full screen.	7.0
Add Resolution Note on Job Appointments	Technicians can now add a Resolution Note on a job appointment. Job appointment resolution notes can be created for any open job. A job appointment note can be viewed, edited, and printed from within Signature, MobileTech and Schedule. During the job appointment completion process in MobileTech, a technician will be able to create a job appointment resolution note. This note will be created with Resolution as the note subject. The job appointment resolution note is included on the updated Job Completion Appointment Summary report which can be generated and emailed from MobileTech. This feature is compatible with Signature 2018 R3 and higher. The appointment can have only one resolution note per appointment and technician. If the appointment is reassigned to a different technician, the note will be moved to the new appointment.	7.0
View Additional Work	Technicians can view Additional Work after syncing by using SERVER MODE. The Additional Work window in the MobileTech Client has been updated to include the DEVICE MODE and SERVER MODE options. Technicians can switch to SERVER MODE to view any Additional Work that they've created that exists on the Middle Tier.	7.0

Enhancement	Description	Version
Enhanced Create New Service Call window	Enhanced the Create New Service Call window. Technicians can search from either their DEVICE or from the SERVER. The MODE is indicated at the top of the window. The Server Mode is a new setup option found under Mobile Device Global Settings in MobileTech Administration. The default value is set to True. - DEVICE MODE : The Customer Location drop-down displays only customers/locations on your device. The Google Nexus 9 (Android Nougat) is not compatible. - SERVER MODE: The Customer Location drop-down displays customers/locations on the middle-tier database (an internet connection is required). Only the customers within the technician's branch display if Global Filtering is enabled in Signature. A Customer Location/Equipment search field is displays at the top of the form if the customer locations and equipment exceed the Fetch Limit settings. This is a case-sensitive field. The search field defaults to Customer Location however you can choose the drop-down to select Equipment.	7.0
Compatibility with Woodford Mobile Audit	Added compatibility to use Woodford's Mobile Audit feature to update the Technician Vehicle table (SV00113). The location information updates automatically based on time/distance plus you can choose to have the location updated when the technician updates appointments, creates a labor transaction, and/or times in/out of appointments. The location data is updated when the device is synchronized to the host. We recommend that you use event-based synchronization so that the technician location coordinates are sent when completing (and syncing) their appointments. This will also enable other applications such as Schedule to view the most up-to-date information about the technician's location.	7.0
New UI	Updated the look of the MobileTech Client with new icons and colors	7.0
Updates for new EPA requirements for refrigerant tracking	New Fields: Refrigeration Equipment Type, Maximum Leak Rate, Current Leak Rate Updated Windows: MobileTech Refrigerant Updated Reports: Call Summary, Appointment Summary	6.0.36
Ability to require task responses	Task responses can be set as required in Signature and enforced by MobileTech during the appointment completion process. If a child response is required but the parent response type is skipped, the required child response is also skipped and marked as Completed.	6.0
Option to display the inventory Quantity Available for a technician’s site	We added the option to display the inventory Quantity Available for a technician’s site. This displays as a third row in the Site Inventory lookup. Qty Available = Qty on Hand – Qty Allocated – pending MobileTech inventory inquiry items	6.0

Enhancement	Description	Version
Ability to create additional appointments	We've added the ability to create additional Job or Service appointments during the Appointment completion process.	6.0
SyncAllEquipmentRecords' is now available to use when 'CreateNewCallForAnyCustomer' is set to True	SyncAllEquipmentRecords is available to use when CreateNewCallForAnyCustomer is set to True. This option determines whether all equipment records that technicians have access to are synced to the client devices. SyncAllEquipmentRecords is no longer connected with the Visual Equipment Inspections (VEI) module.	6.0
New 'AssignedEquipmentValidationLevel' setup option added	A new Equipment setup option called 'AssignedEquipmentValidationLevel' was added. This lets you set the level of requirement for equipment to be assigned during the appointment completion process.	6.0
Event-based sync added to field payment form	We added event-based sync to the Field Payment form. If UseEvenBasedSync in Options > Mobile Device Global Settings is set True, the device will auto-synchronize to the host.	6.0
Control technician email delivery	The ability to control technician email delivery at the report level was added. For example, if you want to email Employee Timesheets to technicians, mark the Email Technician check box. MobileTech Admin > Setup Options > Options > Report and Email Options.	6.0
Additional search fields for appointments in Time Entry	We've added additional fields to search for service or job appointments in Time Entries. You can now search by Customer Name, Location Name, Location Address 1, Location Address 2, Location City, or Location State.	6.0
XOi Workflow integration.	We’ve enabled easy access to XOi Technology’s new workflowenabled Vision Portal from within the appointment form. The XOi workflow setup enables the field resources to follow the workflow process during appointment. Images can be associated with any step of the workflow. MobileTech continues to support the creation of the hyperlink value, stored in the Call Resolution field.	6.0
Reporting	Refrigerant Tracking now included on the Call Summary and Appointment Summary reports. Report maintenance has been enhanced to include a CreatedOn date column as well as the ability to sort columns by choosing a column heading.	6.0
Synclog.txt now includes Woodford project details	The Woodford project name, last published date, and version details are now included in the synclog.txt file	5.6
New report maintenance window in MobileTech Admin	Added a new Report Maintenance window in MobileTech Administration. This can be used to determine why a report has a status of FAILED in the middle-tier report table. Note that the report also must have a related appointment in the middle-tier appointment table to display in this window.	5.6

Enhancement	Description	Version
New user role window in MobileTech Admin	Added a new User Role window in MobileTech Administration. This window is used to create and/or remove roles and assign and/or unassign roles to users.	5.6
Filtering on the User List in MobileTech Admin	Filtering has been added to the User list in MobileTech Administration. You can filter by user name, technician ID, or email address.	5.6
Service Call View displays caller information	The Service Call Caller Name, Caller Phone #, and Caller Email address have been added to the Service Call pane. Note: Modifier must be used to add these fields to the Service Call in Service Management.	5.5
Calendar Day/Week View displays Customer and Location	The customer name and location now display on the Day and Week views of the Calendar so that you can see who the work is for without opening the appointment.	5.5
New Resolution setup option	We added an option under Resolution Settings to make the Call Resolution Note a required field. You can choose to require or warn the technician or you can leave the default value of "Optional".	5.5
Time Entries view includes Total Labor Hours	Total labor hours are now available on the Time Entries view and Appointment Complete pane. You can choose to view the current or previous week's hours for the technician. You can only see the current week while on the Appointment Complete pane in the Time Entry tab. You can choose to show this information in Setup Options.	5.5
Password complexity and lockout policy setup options	We've added the ability to set up password complexity (length, values). You can also set up a lockout policy for invalid login attempts to either lock a user's account for a specified time period or disable the account. The system administrator can unlock or enable a user's account in the User window.	5.5
Attachments for Additional Work	The ability to attach photos/files to the additional work records that synchronizes with Service Management has been added. This attachment can be viewed by the back office in the Mobile Additional Work Inquiry window. This feature is only compatible with Signature 2016 R2.	5.5
Technician name on resolution note timestamp	For improved clarity, the call resolution note timestamp has been updated to replace the technician ID with the technician name.	5.5
New role creation	The ability to create new roles in MobileTech has been added. This allows you to tailor MobileTech for different types of technical roles using Woodford.	5.5
Additional info can be added to email subject line	Email subject lines can be set up to include service call ID, appointment number and/or location.	5.5
Job Inventory item can have different cost codes	Users now have the ability to add the same inventory item with different cost codes to a job appointment.	5.5

Enhancement	Description	Version
Signature Validation options	Signature Validation under Signature Settings has been separated into two options: Customer Signature and Technician Signature. You can choose to require or warn the technician prior to completing the service appointment or you can leave the default value of "Optional". Both customer and technician name are included in the validation process.	5.5
See: WennSoft's integration to smart glasses technology	We've added integration to XOi Technologies through a new feature called See. XOi equips field technicians with smart glasses technology that captures and shares photos and videos to a cloud-based platform. The technician can now associate this visual intelligence to an appointment during the completion process. After selecting items in a new See pane, the technician can generate a unique hyperlink which is copied to the Resolution Note. After synchronizing and after the summary report is attached to the service call, back office users can access and view the images and video using the resolution note hyperlink. Customers can similarly access the images and video via the hyperlink in the call summary and job appointment summary reports. The activities on the XOi server are tagged with the call ID, appointment number, location name and XOi user ID.	5.5
Flexible Forms for Appointment Completion	Users can elect to optionally use Woodford's Flexible Forms with the Appointment Completion window. Flexible forms combine data from multiple entities into a single view. A settings option has been added to enable this display option.	5.5
Purchase Orders download to device	Purchase orders created in the back office and associated to a service call will synchronize as read-only information on the technician's device.	5.5
Status updates automatically when timing in to a job appointment	Depending on setup, when a technician times in to an appointment, the appointment status can be automatically updated to a predefined status.	5.5
Latitude and longitude information is now a two-way synchronization	Entries in the field to set latitude and longitude for a location or piece of equipment now synchronize to Service Management.	5.5
Job Appointment Summary Report	We've added a Job Appointment Summary Report that's generated when a job appointment is completed. This report displays the job, appointment, labor and inventory information related to the completed appointment. The report is attached to the Job Cost Code and is automatically sent by email to designated recipients. Note: The Job Appointment Summary Report only displays labor, expense and travel information if entered by the technician assigned to the job appointment within MobileTech. If the information is entered outside of MobileTech or by another technician, the information will not display on the report.	5.5
Size of Description field increased in Additional Work pane	The Description field in the Additional Work pane now can include up to 32,767 characters.	5.0

Enhancement	Description	Version
Technicians can view task materials and create inventory transactions for them	Technicians can view task materials and create inventory transactions for them	5.0
Error log can be cleared	Technicians can clear the error log on the device after they email the information to an administrator so it's easier for administrators to find the information that pertains to the most recent errors. This option is available on the client About MobileTech page.	5.0
Administrators can change admin account passwords	A Change Administrator Password option is available in MobileTech Administration so that MobileTech administrators can change the password for the administrator accounts. This option is available only for users who belong to the SQL server SysAdmin role.	5.0
Technicians can see which appointments they're timed into	Technicians can easily see a visual indicator – a small clock icon – in the appointment list showing which appointments they're timed in to. Also, the Time In/Out button has been updated to display either Time In or Time Out, depending on whether the appointment is ready to be timed in or out. This functionality is available if UseTimeLog = True in the setup options.	5.0
Time In/Time Out fields added to the Summary tab and the Call Summary and Appointment Summary reports	The Time In and Time Out field values are displayed in the Appointment Summary Preview and Job Summary Preview panes, and also on the Call Summary and Appointment Summary reports for service appointments. This functionality is available if UseTimeLog = True in the setup options.	5.0
Scanned barcodes filter the unassigned equipment list	If you opened the equipment list from a service call and selected the View Unassigned view, the barcode icon was displayed even though it couldn't be used. Now you can scan the barcode for a piece of equipment. This filters the list of unassigned equipment to display the piece of equipment that you scanned. This functionality is available if UseBarcoding = True in the setup options.	5.0
Full-screen view available (Windows only)	An option is available on the client Setup page on Windows devices to display MobileTech in full-screen view. The title bar, including the icons for minimizing, maximizing, and closing the app, won't be displayed.	5.0
Confirmation message displayed when closing client (Windows only)	An option is available on the client Setup page on Windows devices to prompt the technician for confirmation before closing MobileTech.	5.0
Max attachment size is displayed on devices	The Max Attachment Size field now is displayed on the client Setup page on devices. Technicians can view the size but it can't be changed on an individual device.	5.0
New calendar icon	If you're using the calendar on the device, you can use a new icon on the calendar view to return to the current day for the selected view.	5.0

Enhancement	Description	Version
New filtering and sorting options available	Many pages include new options for filtering and sorting the records that appear on the page, so technicians have more control over the information they're viewing. Technicians can select filters and properties, and can specify which column to sort by and whether to sort in ascending or descending order. These options aren't available by default. To turn them on or off, technicians can use the Search Buttons field on the Setup page on the client device.	5.0
Refresh specific lookups	A new form has been added by choosing Tools > Refresh Lookups in MobileTech Administration. You can use this form to refresh specific lookups for a technician without having to sync all lookups. After you've initially loaded data and synced all lookups for your users, you can refresh data for just the employee-related lookups and load data for any subsequently added users.	5.0
Building information displayed for equipment	The building information that is specified for equipment records in Service Management is displayed in the Equipment pane in MobileTech. The building ID and room number are displayed for each equipment record so that technicians can more quickly locate equipment in need of repair. They also can choose the Building ID link to view more information about the building. This feature is available only if you're using Signature 2016.	5.0
Middle-tier database cleanup job set up as a recurring job	The middle-tier database cleanup job that is automatically created when you first install MobileTech Administration is set up as a recurring job. The job will run every four hours instead of just once per day. If you're upgrading from a release prior to R4.0 SP1, you can manually set up the cleanup job.	5.0
Documents can be copied and pasted into MobileTech as attachments	You can copy various types of files, such as Microsoft Word documents and PDFs, and paste them into MobileTech to be saved as an attachment to a service call or task. Note: You can use Woodford to specify which document types are allowed.	5.0
Technicians can email or call customer contacts from Contact pane	The Contact pane has been updated to make it easier for technicians to directly contact customers. Technicians can select a customer and location, and then choose the Contacts tab and select a contact. If phone and email information is set up for the contact, technicians can choose the appropriate icons to either launch the email app or call the contact.	5.0
Integration Monitor performance enhancements	A page-size control was added to the Integration Monitor area of MobileTech Administration so that records are loaded more quickly. You can use the page control buttons to move through the pages in the grid.	4.0

Enhancement	Description	Version
Service appointment notes summary	An appointment notes summary was added so technicians can use one location – the Appointment tab in the appointment details – to more easily navigate to these types of notes that can be related to a service call appointment: - Customer notes - Customer location notes - Service call notes, including service call description and resolution notes - Appointment notes - Equipment notes for one or more pieces of equipment - Contract notes	4.0
Technician device information viewable from MobileTech Admin	The users page in the MobileTech Administration application includes a Synced Devices pane that lists information about the technicians' devices, such as the date when each device was last synced, the policy for the device, and the version of MobileTech and the operating system that are installed on the device.	4.0
Service call ID and appointment number added to email subject and PDF attachment name for Call Summary, Appointment Summary, and Field Invoice reports	On the Report and Email Options page, you can add a parameter to the email subject text so that the service call ID and appointment number are included in the email subject line and the name of the PDF attachment when the Call Summary, Appointment Summary, or Field Invoice reports are sent via email.	4.0
Option to install a SQL cleanup script job for the middle-tier database	In MobileTech Administration, you can install a SQL cleanup script job to run daily. This job looks in the middle-tier database for records related to service calls that were closed or completed more than 14 days ago. Those records are removed from the middle-tier database during the next integration sync.	4.0
iOS 64-bit support	MobileTech includes iOS 64-bit support.	4.0
Manually download attachments that are too large to be automatically downloaded	If an attachment's file size is too large for the attachment to be downloaded during normal processing, the Attachment pane displays a message alerting you to the situation. This pane also includes a link that you can use to manually download the file.	4.0
In MobileTech Admin, control whether event-based syncing is used	An option has been added to MobileTech Administration to control whether event-based syncing can be used on devices. This setting, UseEventBasedSync, is a global setting that determines whether event-based syncing is used to sync to the host system after a service call is created, an appointment is created or completed, or a timesheet report is requested. Sync Login must be unmarked on the Setup page for event-based syncing to occur automatically.	4.0

Enhancement	Description	Version
Configure MobileTech Admin to consume the WennSoft Registration service over SSL	Previously, MobileTech Administration couldn't be set up to consume the WennSoft Registration service over Secure Sockets Layer (SSL). Now, when you install MobileTech Administration, you can indicate whether the registration web service was installed on a secure website.	4.0
iOS 9 compatibility	Mobile Tech compatibility with iOS 9	4.0
Attachment sync filter changed to prevent certain report types from syncing to devices	The attachment sync filter has been changed so that by default, these report attachments aren't synced from the middle-tier database to the devices: - Call Summary report - Appointment Summary report - JSA report	4.0
Added Equipment Functionality	Request equipment for a service call, request history for a piece of equipment as well as adding a piece of equipment to the location have all been added as functionality. Equipment ID can now be entered and is editable. Includes a setup option to make Equipment read-only on the Equipment Details form.	Prior to v 4.0
Bar Coding	Support of Bar Coding for Tasking and Inventory. When an equipment bar code is scanned, MobileTech opens the appropriate service call and takes the user to the task tab.	Prior to v 4.0
Create a Call for any Customer	To support after hours dispatch the ability to create a call for any customer that a technician has access to, has been introduced. Add Caller Name, Caller Position, Customer PO Number and Equipment ID to the New Service Call Form. Should the Customer PO be checked as required on the host, it will also be required for the new call created on the MobileTech Client.	Prior to v 4.0
Customer Requested Items	Enhancements include Technician Name to the Service Call History Tab, Contract Type to the Equipment Details form, Task View to group by Sub-location instead of Location, (for a service appointment) send the time when it is entered, not when the appointment is completed, the ability to filter Vendors by Branch and the ability to enter Unbilled Expenses.	Prior to v 4.0
Field Purchase Order	Delivers the ability to create a purchase order in the field. The PO number can be generated by MobileTech or the option exists to have the field user enter the PO number, providing maximum flexibility.	Prior to v 4.0
Call completion	Multiple signatures to validate work performed allows the technician to gather all of the signatures required to validate the work performed from both the customer and technician.	Prior to v 4.0

Enhancement	Description	Version
Save signature	Provides the ability to keep the signatures for the duration of the appointment on the device.	Prior to v 4.0
Ability to discount	Provides the ability to allow the technician to process a discount or coupon pre-tax off of a invoice generated in MobileTech.	Prior to v 4.0
Refrigerant Tracking	Provides the ability to enter refrigerant usage by equipment using MobileTech.	Prior to v 4.0
Allow receiving a drop ship purchase order to a service call.	Provides the ability to allow receiving of a drop ship purchase order to a service call in MobileTech.	Prior to v 4.0
Add Item Class and Serial Number to inventory view	This will allow technicians to filter inventory lists by item class and ensure they select the correct serialized item.	Prior to v 4.0
Preview invoice prior to complete appointment	Technicians will be able to preview the invoice in the field prior to collecting payment to ensure the invoice is accurate and make changes accordingly. Once the invoice is accurate, we will also have the ability to capture the customer signature and print on invoice	Prior to v 4.0
Send broadcast on Service Call complete from Host to remove appointment from device	When a call is completed at the host if the call has been broadcast we will send another broadcast to remove the call from the technicians device to avoid confusion.	Prior to v 4.0
Completed Appointment Device Capture for MobileTech	Regardless of connectivity issues ensure completed appointment information is transmitted and received. Appointment information, for completed appointments, is saved on the hard drive, if using a laptop computer, or on the SD Card for a Windows Mobile device. This enables the ability to retransmit a call in the event there was a data communication failure. There is a new process on the host to process a re-transmitted call.	Prior to v 4.0
Document Purge for MobileTech	Delivers the ability to manage your device memory to optimize performance. There are settings that can be set to run to purge documents and files older than a determined age. This allows a technician to easily remove old call summary reports and other files. For a Windows Mobile device, it helps guard against degraded performance if RAM becomes too full.	Prior to v 4.0
Invoice and Collect Payment in the Field for MobileTech	Invoice and collect payment in the field at the time of service. With this enhancement you now have the ability to create customer invoices in the field once the work is done. Provides the ability to collect payment and track the payments to be able to reconcile the money when the technicians come back to the office	Prior to v 4.0
Notes Options as Part of Set-up for MobileTech	Provides options for how your technicians use notes whether read only, modify or creation. Currently the notes have been read only, with new setup options, you can determine by note type which notes technicians can create or modify.	Prior to v 4.0

Enhancement	Description	Version
Paging for MobileTech	Communicate to a technician via an email page to single or multiple technicians. New technology has been implemented to update email paging to use Database Mail instead of SQL Mail and allow paging to multiple technicians and teams. Configurability for data in additional fields to be added to pages has been introduced as well. Users have the ability to broadcast planned maintenance calls to mobile users during call generation.	Prior to v 4.0
Reassigned Call Deletion for MobileTech	Make sure your technicians' schedules are always up to date when appointments are deleted from his or her schedule. When service call appointments are reassigned or mass reassigned they are automatically deleted from the original technician and updated details are sent to the new technician whether for a single re-assignment, or for a mass reassignment.	Prior to v 4.0
Barcode support for MobileTech 2013 or higher	- The barcode feature allows the field technician to scan a barcode from a piece of equipment or sub- location with the MobileTech device for easy navigation and accessibility to the assigned tasking. - A barcode can be used to automate the entry of an inventory part C245 during the appointment completion process. Note: A high resolution camera is required.	Prior to v 4.0
Field invoicing and payments for MobileTech 2013 or higher	- Provides the ability to create an invoice in the field (requires connectivity) as part of the work completion process and email it to the customer. The invoice can include labor, equipment, travel, inventory, technician hours etc., and the signatures of both the customer and technician, if captured. -A field technician will have the ability to take a payment of cash, check or credit card as part of the work completion process.	Prior to v 4.0
Visual Equipment Inspections MobileTech 2013 or higher	This module gives the MobileTech user the ability to inspect equipment and markup damages or markings found on the equipment on a diagram or image directly on the MobileTech device. This includes damages identified during check out or check in of the equipment.	Prior to v 4.0
Resolution description	The resolution code Description field holds 255 characters. This is useful for MobileTech users who want to work with a resolution description that is longer than the previous 30-character limit.	Prior to v 4.0
Service Call Task Code Attachment	Provides the ability to add attachments to task codes from the Task Code Setup window and the Service Task Code window in Service Management and MobileTech. The attachments can be viewed in either window in addition to the service call.	Prior to v 4.0

Enhancement	Description	Version
Attachments to Additional Work	MobileTech technicians can now attach files to Additional Work records. The attachments are visible in the Mobile Additional Work Inquiry window. These attachments synchronize to the database as an attachment to the Additional Work record when the Technician syncs data to the server.	Prior to v 4.0
Ability to add notes to a change order.	Provides the ability to add notes to a job change order and save.	Prior to v 4.0
Work Crew Payroll Time Entry	Provides the ability to enter payroll time entry for a work crew in Service or Job Cost. This process includes setting up a work crew, assigning a group of technicians to the work crew and then entering time.	Prior to v 4.0
Job Cost change orders	Users will be able to enter a description of what the change order consists of in a note.	Prior to v 4.0
Job Cost cost code level change orders	Users will now be able enter change orders at the cost code level. This helps track the exact change orders when comparing totals at the cost code level.	Prior to v 4.0

WennSoft	Equipment Management *Supported Versions: 2025 and 2024 (2018 R9)*	
Enhancement	**Description**	**Version**
Ability to mark task codes and lists as inactive.	In Service Management, task codes and task lists can now be marked inactive at the setup level while maintaining historical entity record integrity. Task codes are inactivated at the setup level in the Task Code Setup window (Setup >Service Management > Lookup Setup > Tasks > Task Codes). Task lists are inactivated in the Task List Setup window (Setup > Service Management > Lookup Setup > Tasks> Task Lists). This affects Equipment Management with the following: Inactive task codes and task lists are filtered out from displaying in any lookup. Existing scheduled maintenance that has task codes or task lists will not be affected by a task code or task list being marked inactive. When creating a service call from the On Rental Entry and/or the Rental Agreement Line Entry windows, only active task codes in the Equipment Model task list are added to the service call. (This task list is assigned to the equipment model in the Equipment Model Maintenance window.) When processing scheduled maintenance to create a service call, only active task codes assigned in the Scheduled Maintenance Type Setup window are added to the service call.	2018R7
Batch Creation windows	We've added new batch entry windows for limited Dynamics GP users. The new batch windows are used in certain Service Management, Job Cost and Equipment Management windows. From the new batch windows, users can only create and/or edit batches.	2016 R2

Enhancement	Description	Version
HTML 5.0 Web Client compatibility	Signature 2016 introduces HTML 5.0 Web Client compatibility which will render Service Management, Job Cost, and Equipment Management forms as HTML5 web pages. The Web Client delivers only the top, visual interface to the device, while computing is still done at the server level. The Web Client offers support for: - Multi-browsers - Any browser that supports HTML 5 such as Internet Explorer, Edge, Chrome, Firefox, and Safari. - Multi-device - Any device that supports HTML5 web browsers such as Android, iOS, and Windows. Note: When using the Web Client, file attachments can only be viewed from and copied to the Microsoft SQL Database.	2016
Unit based credit limits	The ability to limit the number of pieces of equipment a customer can rent in addition to the dollar based credit limit.	2013 R3
Customer Center	A centralized location to view equipment and service data for a branch or specific customer. This page includes counts with links to the various data for quick access to additional details.	2013 R3
Customer Insurance	The ability to setup insurance requirements to ensure a customer has the necessary insurance before equipment can be rented.	2013 R3
Equipment Pricing enhancements	Provides the ability to define pricing at a group level, to copy pricing from one record to another and set a default price level. This provide greater flexibility and more detailed pricing options that are easier to manage.	2013 R3
Operating Leases	Manage agreements as operating leases with full control of equipment units, lease term, and the ability to enforce lease end dates.	2013 R3
Document Attachment management	Provides the ability to physically store attachments to a location that you define for the Customer Insurance Details, Equipment Manager, Rental Agreement Entry, and Rental Agreement Line Entry windows.	2013 R3
Invoice Grouping options	Provides three invoice options which will group invoices based on customer setup (Bill to, Ship to or Rental Agreement). The invoice option will determine which version of rental invoice a customer will receive.	2013 R3
User branch filtering	A branch filtering feature has been added to Customer Center and other particular windows that filter by default to the user branch, yet also provides the user the ability to view other branches.	2013 R3
Additional address information	Provides the ability to set up price levels and branches at the customer address level.	2013 R3

Enhancement	Description	Version
Vehicle Readings (Tire, Brake and Fuel Tracking) Module	This module provides the ability to record and invoice tire and brake wear and fuel levels for use in equipment on a service call when associated with a rental agreement.	2013 R3
Finance Leasing Module	This module provides users with the ability to sell equipment and charge principal and interest over a period of time based on a finance lease and automatically process relevant accounting entries.	2013 R3
Synchronizing equipment locations	Provides the ability to automatically synchronize equipment records between Equipment Management and Service Management.	2013 R3
Equipment partial transfer to booking	Allows you to select specific equipment to transfer from a booking to a new or existing agreement, and allows for ongoing transfers to an existing agreement. You can create a larger booking with the equipment models and then progressively transfer some of the lines into an agreement over time.	2013 R2
Rental Model Availability Inquiry	Allows you to view the quantity available by equipment model or category. The inquiry window includes total equipment, number reserved (booked plus on-rent), and the quantity available to rent for the defined range of dates.	2013 R2
Scheduled Maintenance forecasting	You can forecast when scheduled maintenance may be due for a piece of equipment, to help anticipate upcoming labor hours and equipment costs. Scheduled maintenance that is based on meter readings can be predicted based on the average usage per day for a piece of equipment. The average usage per day is determined based on the equipment’s meter readings for the last X number of days.	2013
Service Management Move Equipment and Move Location updates Equipment Management Link	This feature provides the ability to keep the equipment link from Service Management and Equipment Management updated to the correct customer/location/equipment. This keeps the link in sync and helps to avoid orphan records.	2010 R2
SQL Server Reporting Services (SSRS) Report Templates	Streamline reporting efficiency with templates for building out SSRS reports which can be tailored for your organization. These report templates can work with any view or table and provide an easy way to make basic reports and charts. This allows a technical resource to build and modify the templates in Report Builder (free with SQL Server Reporting Services).	2010

Enhancement	Description	Version
Equipment Service Cost per Meter UOM	Provides the total cost for a piece of equipment over a period of time. This shows service costs, including total cost and cost by category, for a piece of equipment over time, as well as the meter unit of measure for that equipment and the calculation of the cost per meter unit of measure. These costs are displayed by equipment record, and you can group the records by any 1-, 2-, or 3-group combination of Customer, Location, Branch, Category, and Model. The grand total and average cost per unit of measure for a group are calculated based on the group's total cost and total units of measure.	10.0 EX FP2
Rental Utilization	View instant fleet utilization results for each equipment unit by dollar and/or days. This enhancement groups by model or category and location. Day report– This looks at the unit's Month to Date, Year to Date, and Life to Date and compares it to actual. Dollar report – This looks at a unit's monthly rate and determines its Month to Date, Year to Date and Life to Date Potential Rental Revenue. It will also compare actual rental revenue. The dollar utilization is a key metric and is used by Fleet Managers to balance their Rental Fleet to ensure the most profitability – purchase, transfer and disposal decisions may result from this analysis.	10.0 EX FP1
Holiday Stand-down	Equipment stand-downs (temporary stop of rental billing due to holiday, natural disaster, equipment downtime, etc.) can be processed across all rental agreements, eliminating the need for a manual entry to each rental agreement.	10.0 EX
Equipment Inactivation	Equipment has the ability to be marked as inactive, preventing it from showing up in the lookup. All historical inquires and reports will still show inactive equipment and the Equipment Manager will maintain full functionality. Equipment marked inactive can be reactivated at a future time.	10.0b01
Invoice Edit List	The option to print an edit list now includes rental-specific fields. Users can print an edit list from Rental Invoice Entry and Rental Invoice Batch Entry to check for invoice errors before posting.	10.0b01
Rent to a Job	The cost of using equipment for a specific job can now be connected to Job Cost, allowing users to see a true picture of costs related to each job. A general ledger transaction is created within the Equipment Rental module and periodically invoices Job Cost, eliminating the need for a manual entry.	10.0b01
Rental Void Functionality	Once an invoice has been printed, it can't be deleted. You can, however, void an invoice within the Equipment Rental module. Voided invoices are moved to history and the user can create a new invoice. Optional functionality allows you to require a user to add an explanation when an invoice is voided. The user and date are stored to improve the auditing process.	10.0b01

Enhancement	Description	Version
Transaction Entry Import Validation	SQL stored procedure for WennSoft GL transactions that performs validation and write simultaneously to the WennSoft Transaction Entry window and the GL. This is a useful tool for building solutions to import Job and Service Call/Contract beginning cost balances or importing from other systems.	10.0 EX FP1
Microsoft SQL Server Reporting Services	Contains a set of Microsoft SQL Server Reporting Services reports. These reports can be printed in a variety of formats, provide better access to your data and can be easily modified to satisfy your specific needs. Examples of these reports include invoices, service work orders and new service contract reports.	10.0 EX FP1
Simplified reporting	Allows users to easily preview and print reports from within the application using a new common printing DLL.	10.0b01
Rental Distributions	Unlimited accounts or distributions can be associated with each rental line, providing automatic account masking and the ability to split amounts by renting or owning branches and divisions.	9.0
Rental Agreement Enhancements	In addition to an improved look and feel, the Advanced Rental module now allows users to estimate the invoicing total based on the start and end dates of the agreement.	9.0
Rental Agreement History	Users can view historical rental agreements in the Advanced Rental module, create inquiry screens, zoom to these screens and move current rental agreement records to history individually or collectively. Rental Invoice Enhancements: In addition to an improved look and feel, users now can view current as well as historical invoices.	9.0
Rental Bookings	Customers can reserve equipment by a category or model. Rental Reservations: Bookings, agreements and lookups are tied together, making it possible to reserve equipment and inquire on equipment availability.	9.0
Rental Roll Forward	This enhancement to the Advanced Rental module allows for automatic adjustments of the unit of measure invoiced when renting over a longer period of time than the invoicing frequency. Users can credit back multiple invoices in one invoice run and re-invoice for the correct quantity/amount, as well as roll forward the invoicing frequency.	9.0
Attribute Reconfiguration	The configure attributes window is now more intuitive. Users can order and display the top 50 attributes in a SmartList, with the attribute description as the column heading.	9.0
Automated Stand-down	Easily create stand-downs that are processed across all rental agreements, eliminating the need for a manual entry to each rental agreement. This feature can be utilized during a temporary stop of rental billing due to holiday, natural disaster, equipment downtime, etc.	9.0

Enhancement	Description	Version
Equipment Hierarchy	Create parent/child relationships between equipment and maintain consistency throughout the Rental, Purchasing, Sales, Scheduled Maintenance, Service and Transport modules.	9.0

WennSoft	Clock <15 customers own Clock |New Sales are Signature Time	
Enhancement	**Description**	**Version**
DVT Rules	Your DVT Rules are now accessed in Settings -> Manage Rates and Rules -> Manage Validation Rules	12.3.0
User interface updates	Continued user interface modernization for management screens, notably project manager approvals	12.3.0
BI Automation	Foundations for analytics and business intelligence automation	12.3.0
Improved time in/out tracking	Improved, consistent, reportable time in/out time tracking across all use cases, including consolidation of various methods for users to track in/out times.	12.3.0
Report output option	New report output option – grid format. This new feature renders standard list data in a columnar format.	12.2.1
Report chart option	New report chart option – multi-value charting. This new chart option allows you to render graphs when two or more numbers are to be compared.	12.2.1
Block manual approval	Option to block manual approval plans when Org Chart Manager is in use. This will prevent the ‘self approver’ fields from being enabled by an administrative user.	12.2.1
Performance Improvements	Significant performance improvements for notifications. Faster, more efficient processing!	12.2.1
Assignment mode on task-by-task basis	Administrators can now choose single versus multi-assignment mode on a task-by-task basis. When you create a new scheduled project, you can pick your assignment mode and carry it down to all tasks under that project, or you can pick different modes for each task.	12.1
New area for reviewing system notifications	With a new bell icon, users can now review all system notifications that were previously shown as red numbers in the navigation menus. You also have the option to review and dismiss the notices. Clicking on a notice takes you to the screen where you can review the data.	12.1
Options for managing time entry screen suggestions	Users can set up keyword and phrase based rules to automatically ignore suggested events on time entry. If a user has turned on suggestions for Exchange calendar or some other third party source, the user can now control what events get hidden automatically. For example, the user may always include a specific phrase for vacation or a personal appointment, and the user can then create rules to block those events from being suggested for time entry.	12.1

Enhancement	Description	Version
More options for manager approvals	Managers can set the default number of search results for the approval queue and Journyx will retain the last setting. This retention of the last setting also applies to other new card-based parts of the user interface (e.g., web report output). When viewing individual sheets under Approve sheets, there are 2 new options that can be customized and retained for future use: - Check box to select the time format. The manager sheet view defaults to HH:MM format, but managers can click the check box for decimal format above the sheet grid. - Selection list that determines what level of detail the manager sees for time entry data. While manual drill down from project to other details is still available, managers can also set a default level of detail to show. Managers can choose to show project + activity, project + activity + pay type, etc.	12.1
New API key security options	New options for generating and managing API keys more securely	12.1
Quick access and temporary reset of report filters	New calendar icon option next to the report dates gives you quick access to change dates or column filters in the report you are viewing. This allows you to make temporary changes to dates and/or filters and rerun the report without saving changes.	12.1
Web report format	The new web format includes pagination of report results, drill down into the details of sub-totals and search of the details in the report. This new format defaults to showing subtotal rows in summary. However, there is an expand/collapse all button in the upper right corner of this report type that allows you to see all details with the click of a button.	12.1
New import tools	New import tools for currency conversions and mileage conversions are available under Configuration→Imports. Sample files and required fields for the imports are included in the Help menu for the respective screens.	2.1
Accruals management updates	Custom roles provide more granular access to Accruals management under Configuration→Roles. The default Manager role that comes with Clock will no longer include Accruals access.	2.1
Improved timesheet printing	Improved formatting for printing timesheets from the browser.	2.1
Clock AccountLink updates	Clock AccountLink also includes a 64-bit version and has been updated to let you save the synchronization password.	2.1
Interim Approvals	New approval workflow allows users to submit work in progress on a timesheet before the full timesheet is complete and submitted at the end of a period. Users assigned to timesheets with the interim submission feature can submit work in progress as often as needed during the period.	2.1

Enhancement	Description	Version
Stopwatch times added for reporting	The Stopwatch Time In and Out values have been added to the Business synchronization TimeTrack batch for reporting purposes.	2.0
My Activity List updates	The My Activity List is auto-populated from Signature. Job activities display for the Project Manager or technicians assigned to a job appointment. Service activities display for technicians assigned to a service appointment.	2.0
Clock Mobile	Clock Mobile is now available for both tablet and smartphone devices using Android or iOS operating systems. Clock Mobile is available for our Signature 2016 and 2018 product series.	Prior to v 2.0

WennSoft	Clock Mobile <15 customers own Clock |New Sales are Signature Time	
Enhancement	**Description**	**Version**
Accrual balances	Accrual balances available on mobile dashboard	12.4.0
Preferred time format	Support for user's preferred time format (decimal or HH:MM)	12.4.0
Improved visibility for manager approvals	Visibility to the user in/out times on manager approvals	12.4.0
Entry deletion	Improved entry deletion performance and consistency	12.4.0
Non-weekly sheets	Improved handling of non-weekly sheets on Android devices	12.4.0
Updates to the Date Picker Control	When you select a date in the date control, the selected date will now default into the 'new' transactions when you click the + button in the bottom of the Time and Expense panels.	12.3.0
New Note Feature	The Notes feature has been incorporated into new Clock mobile application. You can once again add notes to both Time and Expense report entries.	12.3.0
Clock Mobile	Clock Mobile is now available for both tablet and smartphone devices using Android or iOS operating systems. Clock Mobile is available for our Signature 2016 and 2018 product series.	Prior to v 2.0

WennSoft

Graphical Schedule Board

Supported Versions: NO LONGER SUPPORTED as of Signature 2018 R4 release

Enhancement	Description	Version
Graphical Schedule Board	Allows dispatchers to easily manage service activities using a visual picture of scheduled service; including assigned, unassigned and unscheduled appointments. Calls are represented by color-coded bars that can be configured to satisfy specific needs. Dispatchers can view all appointments, jobs and technician activities in one view; appointments are displayed in one row per technician ID; appointments are color coded by call type, problem type, service area and appointment status; drag and drop scheduling allows dispatchers to easily add appointments to the technician schedule; service management scheduling constraints and validation rules are automatically enforced; customer, location and service call notes are readily available; dispatchers can generate an email or an alphanumeric page containing a single appointment using the context menu item; dispatchers can broadcast a call to a technician's mobile device using the context menu item; sorting and filtering is available by appointment and by technician; user-defined appointment, job appointment, technician activity and technician data is displayed in expanded detail by hovering over the appointment or activity; one-, five- and seven-day or monthly schedules-at-a-glance can be printed	10.0 EX FP1
Dispatch Mapping	Internet Mapping for Google and Bing Maps. Utilize the latest in mapping applications from Google and Bing to create technician routes, identify the closest technician to an unassigned appointment, print maps, driving directions and save as an HTML file. Integration to Automated Vehicle Locator (AVL), allowing the ability to pinpoint a technician's location is also available. The WennSoft Map Interface allows users to view existing appointments from the dispatch board with filtering to show unassigned, single technicians or technician teams; utilize multiple icons for home offices, technician vehicles and appointment locations; facilitate automatic creation of technician routes by appointment start time, drive time or shortest distance; create routes for technicians using the latitude/longitude of their current locations, allowing for tweaks to be made to the route order based on the information; save all options, based on the individual user, and map technicians globally, limited only by the data provided by Google or Bing maps	10.0 EX FP1

Enhancement	Description	Version
Global Technician	Technicians can now be assigned to more than one branch, eliminating the need for duplicate technician account creation. Dispatchers can view technician schedules using the Graphical Schedule Board and schedule technicians in multiple branches.	10.0 EX