SedonaOffice®

The #1 Financial Software for Security Companies

Release Notice

Version 5.7.92

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PERENNIAL SOFTWARE

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About this Document

This Reference Document is for use by SedonaOffice customers only. This document is not intended to serve as an operating or setup manual. Its purpose is to provide an overview of the enhancements and corrections made in the release and is to be used for reference purposes only.

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Overview

This document is being provided to explain the changes made to the SedonaOffice application since Version 5.7.91. This is an intermediate version update that contains application corrections and enhancements.

About This Release

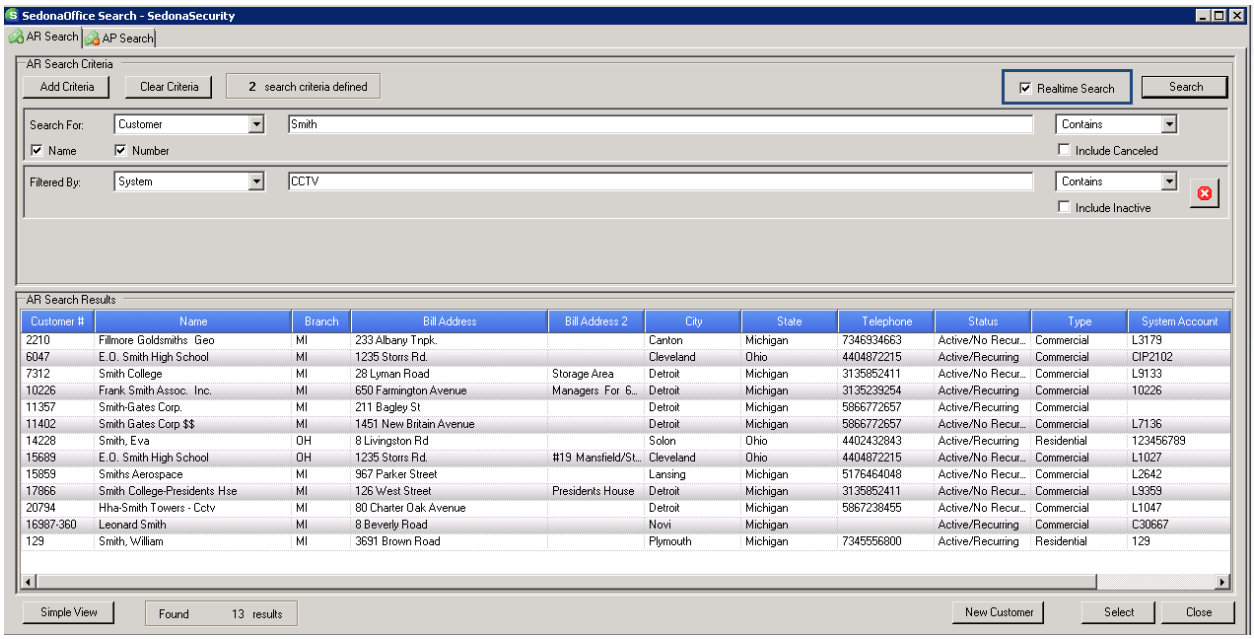
Customers updating to 5.7.92 are receiving all of the changes made in 5.7.89-5.7.91 plus corrections to a few reported issues in those versions. ***Customers should read the release notes for 5.7.89/90/91 as there were important changes made in that version***.

Application Enhancements/Improvements

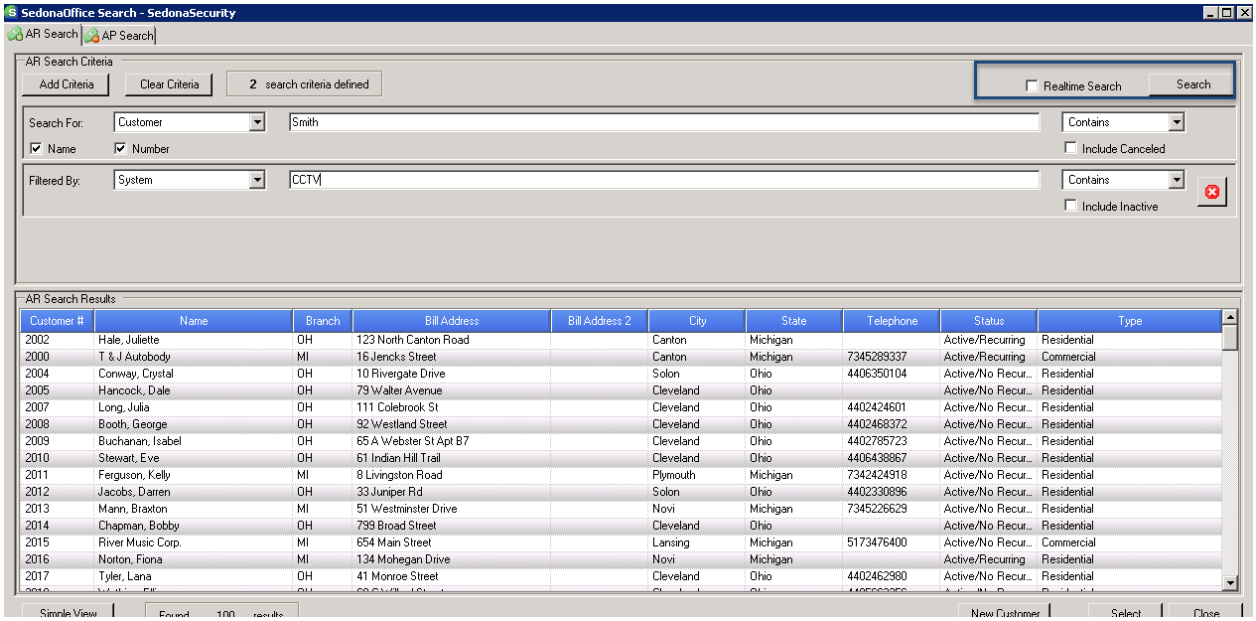
Client Management

Customer Search – Advanced View

To assist with the speed of search results, a “Realtime” checkbox has been added to the Customer Search function. A checkmark in this box indicates that the user wants to have results immediately presented as they are entering the search criteria.



If the box is left unchecked, the user is telling SedonaOffice not to begin the search until all search criteria has been entered



Application Corrections

Accounts Payable

Bill

Reported Issue: When a user placed a checkmark in the box "Create Bill From Receipt" on a PO Receipt created in versions earlier than 5.7.89, the parts on the receipt did not populate on the bill. This issue has been corrected.

Reported Issue: When a user created a bill from Accounts Payable and selected multiple receipts marked as OTH, the bill would not populate with all of the receipts. This issue has been corrected.

Purchase Orders

Reported Issue: When a direct expense PO was created outside of a service ticket (and the parts for the PO were not defined within the Equipment and Parts tab within service ticket), the detail of the parts order could not be viewed within the service ticket. The PO tab within the service ticket only showed the total amount of the parts. The issued has been corrected.

Reported Issue: When a PO contained a quantity of more than 999 of any item, it printed with a quantity of 000. This issue has been corrected.

Purchase Order Receipt

Reported Issue: A user attempts to receive in a PO created in a version earlier than 5.7.89. When the receipt is created, the details of the parts are not displayed on the receipt. This issue has been corrected.

Reported Issue: A user receives a PO with serial parts on it and selects a specific serial number to go to a job. The receipt is then edited so that the serial number is no longer received on that receipt. A new, separate, receipt is then created for the part with that serial number. The new receipt allowed the user to receive in the same serial number yet the serial number was never recorded as being recorded as received. This issue has been corrected.

Vendor Search

Reported Issue: The Vendor Search tab was available to Usergroups that did not have permissions to view vendors. This issue has been corrected.

Accounts Receivable

Batch Email Invoices

Reported Issue: Users were unable to open Batch Email Invoices within SedonaEmail from the Application Tree. This issue has been corrected.

Client Management

Bill To

Reported Issue: When a user clicked on a customer's Bill To address, they were presented with the site address. This issue has been corrected.

Customer Search

Reported Issue: The customer search function was unable to locate a customer by check number. This issue has been corrected.

General Ledger

Account Register

Reported Issue: When users were looking in the account register for the register type INV, the balance for the end of the month was not being displayed as the same balance for the first day of the next month. This issue has been corrected.

Jobs

Invoice

Reported Issue: Users were receiving the error "5 Invalid Procedure Call or Argument" when creating an invoice jobs where the site had been changed. This issue has been corrected.

Job Costing Screen

Reported Issue: Credits made to job invoices containing RMR items were not being recognized on the Job Costing screen. This issue has been corrected.

Job Ticket

Reported Issue: The job ticket was not reporting all pre-existing parts on the customer's equipment list on the Job Ticket. This issue has been corrected.

Retention Invoice

Reported Issue: The retainage invoice for a job was being sent to the customer instead of to the third party to whom the invoices had been addressed. This issue has been corrected.

SedonaSchedule

Job Appointments

Reported Issue: When users created an appointment for a job and pressed the Go To Job button, the job would not open. This issue has been corrected.