

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.

The screenshot shows the 'AR Search Criteria' window with the following details:

- Search For:** Customer (dropdown), Smith (text input)
- Search Options:** Realtime Search, Include Canceled
- Filtered By:** System (dropdown), CCTV (text input)
- Search Results:** A table with 13 rows and 11 columns.

Customer #	Name	Branch	Bill Address	Bill Address 2	City	State	Telephone	Status	Type	System Account
2210	Fillmore Goldsmiths Geo	MI	233 Albany Thpkl.		Canton	Michigan	7346934663	Active/No Recur...	Commercial	L3179
6047	E.O. Smith High School	MI	1235 Storrs Rd.		Cleveland	Ohio	4404872215	Active/Recurring	Commercial	CIP2102
7312	Smith College	MI	28 Lyman Road	Storage Area	Detroit	Michigan	3135852411	Active/No Recur...	Commercial	L9133
10226	Frank Smith Assoc. Inc.	MI	650 Farmington Avenue	Managers For 6...	Detroit	Michigan	3135239254	Active/Recurring	Commercial	10226
11357	Smith-Gates Corp.	MI	211 Bagley St		Detroit	Michigan	5866772657	Active/Recurring	Commercial	
11402	Smith Gates Corp \$\$	MI	1451 New Britain Avenue		Detroit	Michigan	5866772657	Active/No Recur...	Commercial	L7136
14228	Smith, Eva	DH	8 Livingston Rd		Solon	Ohio	4402432843	Active/Recurring	Residential	123456789
15689	E.O. Smith High School	DH	1235 Storrs Rd.	#19 Mansfield/St...	Cleveland	Ohio	4404872215	Active/No Recur...	Commercial	L1027
15859	Smiths Aerospace	MI	967 Parker Street		Lansing	Michigan	5176464048	Active/No Recur...	Commercial	L2642
17866	Smith College-Presidents Hse	MI	126 West Street	Presidents House	Detroit	Michigan	3135852411	Active/No Recur...	Commercial	L9369
20794	Hha-Smith Towers - Cctv	MI	80 Charter Oak Avenue		Detroit	Michigan	5867239455	Active/No Recur...	Commercial	L1047
16987-360	Leonard Smith	MI	8 Beverly Road		Novi	Michigan		Active/Recurring	Commercial	C30667
129	Smith, William	MI	3631 Brown Road		Plymouth	Michigan	7345556800	Active/Recurring	Residential	129

At the bottom of the window, it shows 'Simple View', 'Found 13 results', and buttons for 'New Customer', 'Select', and 'Close'.

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

The screenshot shows the 'AR Search Criteria' section of the SedonaOffice Search - SedonaSecurity application. It includes a search bar with 'Customer' selected and 'Smith' entered. There are checkboxes for 'Name' and 'Number', and a 'Realtime Search' checkbox which is unchecked. Below the search bar, there is a 'Filtered By' section with 'System' selected and 'CCTV' entered. The 'AR Search Results' section displays a table with columns for Customer #, Name, Branch, Bill Address, Bill Address 2, City, State, Telephone, Status, and Type. The table contains 17 rows of data.

Customer #	Name	Branch	Bill Address	Bill Address 2	City	State	Telephone	Status	Type
2002	Hale, Juliette	OH	123 North Canton Road		Canton	Michigan		Active/Recurring	Residential
2000	T & J Autobody	MI	16 Jencks Street		Canton	Michigan	7345289337	Active/Recurring	Commercial
2004	Corway, Crystal	OH	10 Rivergate Drive		Solon	Ohio	4406350104	Active/No Recur...	Residential
2005	Hancock, Dale	OH	79 Walter Avenue		Cleveland	Ohio		Active/No Recur...	Residential
2007	Long, Julia	OH	111 Colebrook St		Cleveland	Ohio	4402424601	Active/No Recur...	Residential
2008	Booth, George	OH	92 Westland Street		Cleveland	Ohio	4402468372	Active/No Recur...	Residential
2009	Buchanan, Isabel	OH	65 A Webster St Apt B7		Cleveland	Ohio	4402785723	Active/No Recur...	Residential
2010	Stewart, Eve	OH	61 Indian Hill Trail		Cleveland	Ohio	4406438867	Active/No Recur...	Residential
2011	Ferguson, Kelly	MI	8 Livingston Road		Plymouth	Michigan	7342424918	Active/No Recur...	Residential
2012	Jacobs, Darren	OH	33 Juniper Rd		Solon	Ohio	4402330896	Active/No Recur...	Residential
2013	Mann, Braxton	MI	51 Westminster Drive		Novi	Michigan	7345226629	Active/No Recur...	Residential
2014	Chapman, Bobby	OH	793 Broad Street		Cleveland	Ohio		Active/No Recur...	Residential
2015	River Music Corp.	MI	654 Main Street		Lansing	Michigan	5173476400	Active/No Recur...	Commercial
2016	Norton, Fiona	MI	134 Mohegan Drive		Novi	Michigan		Active/Recurring	Residential
2017	Tyler, Lana	OH	41 Monroe Street		Cleveland	Ohio	4402462980	Active/No Recur...	Residential

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 issue 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.