



SedonaOffice Release Notice

SedonaOffice

Version 5.6.185

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SedonaOffice

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About this Document

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Overview

This document is being provided to explain the new features and changes made to the SedonaOffice application since the last released Version 5.6.180. This is an intermediate version update that contains new features and application corrections.

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Application Enhancements/Improvements

Client Management

Cancellations

The Memo\RMR Comments form has been expanded to allow the entry of up to 1,024 characters of text. Prior to version 5.6.185, this field only allowed 255 characters.

The screenshot shows a software window titled "Cancellation (16975 Cameron, Elizabeth)". The window contains the following information:

- Customer Information:** 16975 Cameron, Elizabeth, 44 Pendleton Road, Novi, MI 48375.
- Reference:** (Empty field)
- Entered On:** 6/17/2013 8:58:14 AM
- Entered By:** carolyn

Reason and Tasks

- RMR Reason:** Competition
- Cancel Profile:** Non-Payment
- Notice Date:** 6/17/2013
- Effective Date:** 6/30/2013
- Follow Up Date:** 6/17/2013
- CS Cancel Date:** 6/17/2013
- Full Cancellation
- CS Cancelled

Memo\RMR Comments:

Typing in a note to be saved on this customer's cancellation record. Jack & Jill went up the hill to fetch a pail of water. Jack fell down and broke his crown and Jill came tumbling after. This is just a very silly note for the purpose of trying to put in many characters to see if I will have any problems when attempting to complete this customer cancellation. I am testing support ticket # 62547 that was submitted by Safeguard Security and Communications which is based out of Scottsdale, Arizona. And Arizona being such a beautiful state should be visited at least once by every American citizen. Duplicate the note again with copy and paste: Typing in a note to be saved on this customer's cancellation record. Jack & Jill went up the hill to fetch a pail of water. Jack fell down and broke his crown and Jill came tumbling after. This is just a very silly note for the purpose of trying to put in many characters to see if I will have any problems when attempting to complete this customer cancellation.]

Completed

Cancelled RMR: \$80.00
Contract Balance: \$0.00

Close

Application Enhancements/Improvements (continued)

System Inspection (Setup)

The Notes field on the System Inspection form has been lengthened from 255 characters to 1,024 characters. As always, any text typed into the Inspection Notes field will create a Ticket Note each time an Inspection Ticket is generated within SedonaService.

The screenshot shows the 'System Inspections' window with the following details:

- Site: Livonia High School (South), 100 Livonia Rd
- System: SR6183, Intrusion/Fire
- Detail | Equipment
- Inspection section:
 - Description: Fire Inspection-Whole System
 - Frequency: Quarterly
 - Service Problem Code: INSP-Fire-QT
 - Service Level: INSP Cont-Com
 - Service Company: MI-SVC Cont
 - Last Inspection: 10/15/2012
 - Next Inspection: 1/1/2013
 - Recurring Item Link: Service Agreement
 - Cycle Amount: 263.00
 - Service Tech: [Dropdown]
 - Group Number: 0
 - Estimated Hours: 0
 - High Frequency Bypass: [Unchecked]
 - Exclude from High Frequency Check: [Checked]
 - Notes: [Large text area, highlighted with a red box and a blue dashed arrow]
- Charges section:
 - Inspection Item: [Dropdown]
 - Amount: 0.00
- Buttons: Save, Terminate, Cancel

Application Enhancements/Improvements (continued)

Job Management

Hold Back Jobs

A significant change has been made to the application related to the tracking of and the invoicing for “Hold Back” (Retention) amounts on Jobs. Prior to the release of version 5.6.185, any amounts deducted from an invoice as a “hold back” would be invoiced in one lump sum while closing the Job.

The application now tracks and processes Hold Back amounts differently.

- For Hold Back Jobs, during the Job Invoicing process, a negative line will be added to the Item tab of the invoice using the Hold Back Item Code assigned to the Job Type. This new invoice line will default to the hold back percentage shown on the Job Work Order form. The User performing the Job Invoicing has the option of changing the Hold Back amount or removing the Hold Back line completely. This new Hold Back line makes it more apparent that an amount is being deducted from the Invoice for Hold Back (Retention) purposes.
- Users now have the ability to invoice for Hold Back amounts at any time throughout the Job process instead of waiting to the end of the Job.
- Manual Hold Back (Retention) invoicing is performed by clicking on a new button that has been added to the Job Work Order form.
- New information for Hold Back Jobs is displayed on the Sales Summary form; Total Retentions deducted from Job invoices and how much retention has been billed to date.

Note: When updating to 5.6.185, any open Hold Back Jobs that have been invoiced at least once, will continue to invoice the customer for all Hold Back amounts during the Job closing process. Only new Jobs created after updating to 5.6.185 will be affected by the new features described above.

Application Enhancements/Improvements (continued)

Hold Back Jobs (continued)

Example of the new Hold Back (Retention) line on a Job Invoice.

Job Invoice - Holdback 10%

Customer Number: 162 | Category: Jobs Com | AR Account: 110110 | Tax Group: MI-Tax Exempt

Bill RMR: RMR Reason: New RMR | Aging Date: 6/27/2013 | Invoice Date: 6/27/2013 | Invoice #: 142878

Activation Date: 6/27/2013 | P.O. Number: | Job Number: 199

Next Cycle Date: 01-Jul-13 | Term: Due On Receipt | Salesperson: Blais Oliver

Items \$33,885.00 | Parts \$0.00 | WIP MLOC

Item	Description	Qty	Rate	Amount	Bill Cycle
▶ Install Intr LCOM	Install Intrusion System-Commercial	0.75	6500	4875.00	
▶ Inst-Com-Fire	Install Fire System-Commercial	0.75	35000	26250.00	
▶ Install Access LCOM	Install Access System-Commercial	0.75	3500	2625.00	
▶ Install CCTVI LCOM	Install CCTV System-Commercial	0.75	5200	3900.00	
* RETENTION	Retention	1	-3765	-3765.00	

Description: Installation Services | Sub Total: 33885.00

Contact: | Tax: 0.00

Memo: | Total: 33885.00

Add to Print Queue | Save | Close

Application Enhancements/Improvements (continued)

Hold Back Jobs (continued)

Example of new information displayed on the Job Sales Summary.

Sales Summary		
HID4045CGNUO	ENTRY PROX STAND ALONE KEYPAD...	2 0.00
HID6005BKBOO	HID PROX POINT MINI READER	8 0.00
HIDCQHIDC1325	CQHIDC1325 KEYSKAN CARDS 50 P...	1 0.00
HJR2416UL	16 CAMERA 24 VAC POWER PANEL	1 0.00
H5R08E500	8 CHANNEL 500G HDD DVR	1 0.00
HTC-65G	1/3 INCH HI-RES COLOR D/N CAMERA	1 0.00
HTC-T6AH28DID	1/3 INCH HI-RES IR BULLET CAMER...	1 0.00
HTC-T78G28D	WDR OTDR VANDAL PROOF CAMERA	6 0.00
HTC105E	DOME CAMERA	11 0.00
IM1270	12V 7AH BATTERY	1 0.00
PC4020NK	D5C 4020 CONTROL PANEL	1 0.00
Total		\$0.00
Total Non Recurring		\$50,200.00
Total Non Recurring Billed		\$50,200.00
Credits/ Holdback Credits		\$0.00
Retention Balance		\$5,020.00
Balance to Bill		\$5,020.00
Retention History		
Invoice Number	Invoice Date	Amount
142869	6/26/2013	1255.00
142878	6/27/2013	3765.00
Retention Balance		\$5,020.00
Recurring		
Item Code	Description	Monthly Amt
MON	Monitoring	225.00
Service Agreement	Service Contract	125.00
Total Recurring		\$350.00
Total Recurring Billed		\$0.00

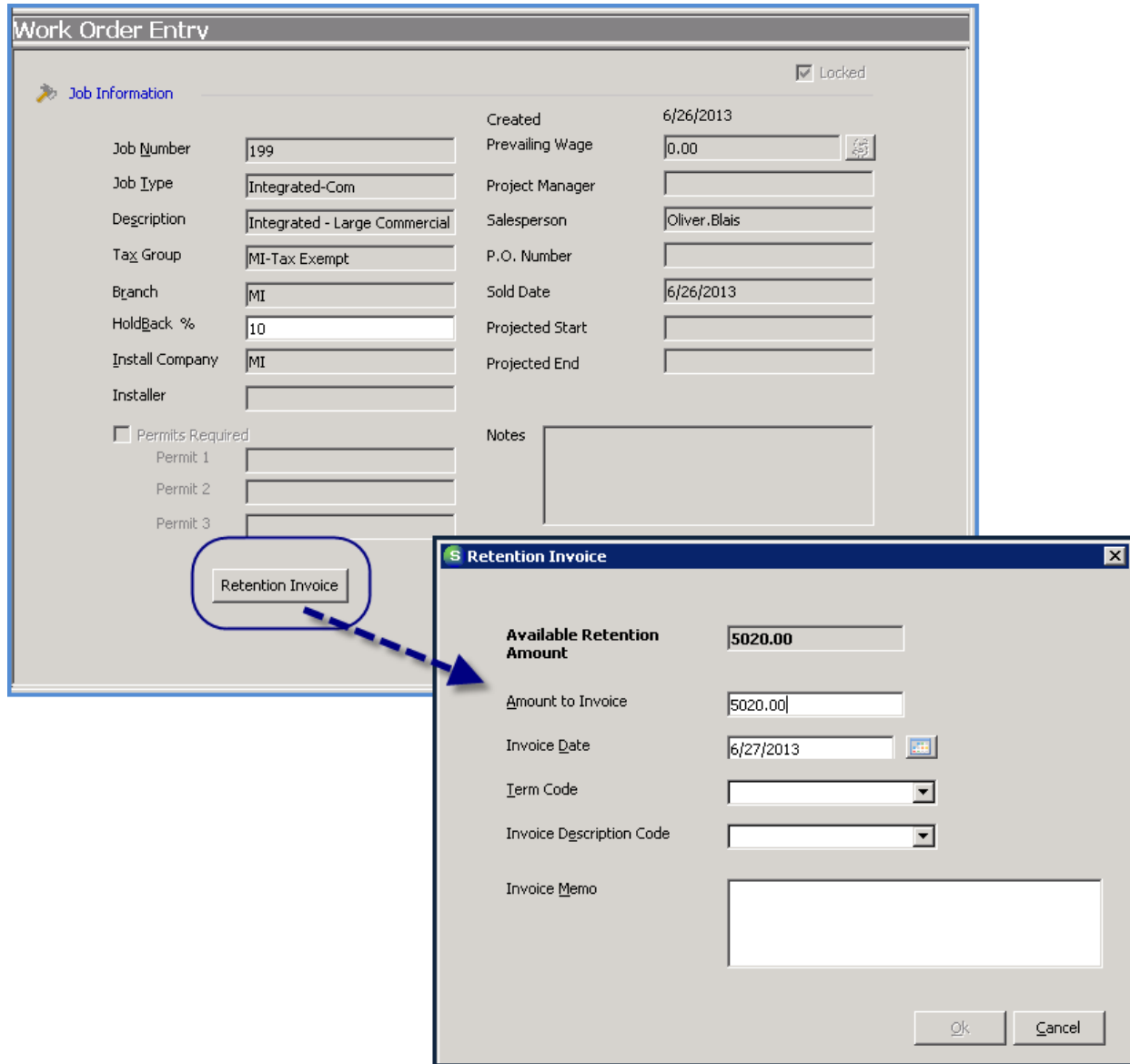
New Information Displayed

New Information Displayed

Application Enhancements/Improvements (continued)

Hold Back Jobs (continued)

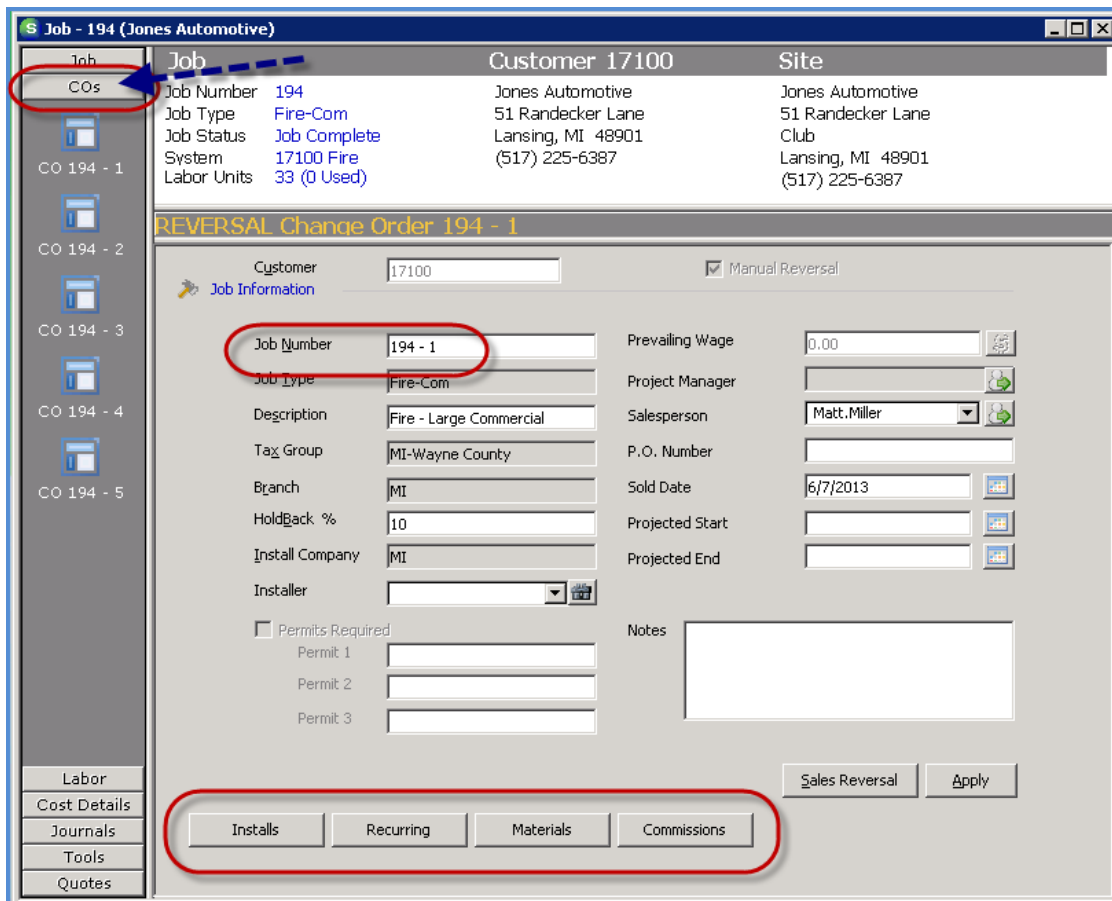
Example of the new Retention Button on the Job Work Order.



Application Enhancements/Improvements (continued)

Job Change Orders

A change has been made to how Change Orders are displayed on a Job. If a Job has more than 5 Change Orders, a new button labeled “CO’s” will be displayed on the main Job Toolbar. Clicking on the CO’s button will display a listing of all Job Change Orders attached to the Job. When clicking on a Change Order, the Change Order Work Order form will be displayed. Access to the Change Order Installs, Recurring, Materials and Commissions is now done by clicking on buttons that have been added at the bottom Work Order form of the Change Order.



Application Enhancements/Improvements (continued)

WeEstimate Import

A change has been made to the import of a quote from WeEstimate: the labor units will be summed when using the direct labor feature and those estimated labor units will now be kept on the first line of the imported installation items.

WeEstimate Notes

All notes imported into a new Job from WeEstimate will automatically be saved as Access Level 2 notes.

Application Enhancements/Improvements (continued)

SedonaService

Multiple Companies

The SedonaService module now supports working in two companies. When two companies are open in the main SedonaOffice application and SedonaService is currently running or is launched, when creating a new ticket or accessing an existing ticket from the Customer Explorer, SedonaService will switch to the correct company.

Application Enhancements/Improvements (continued)

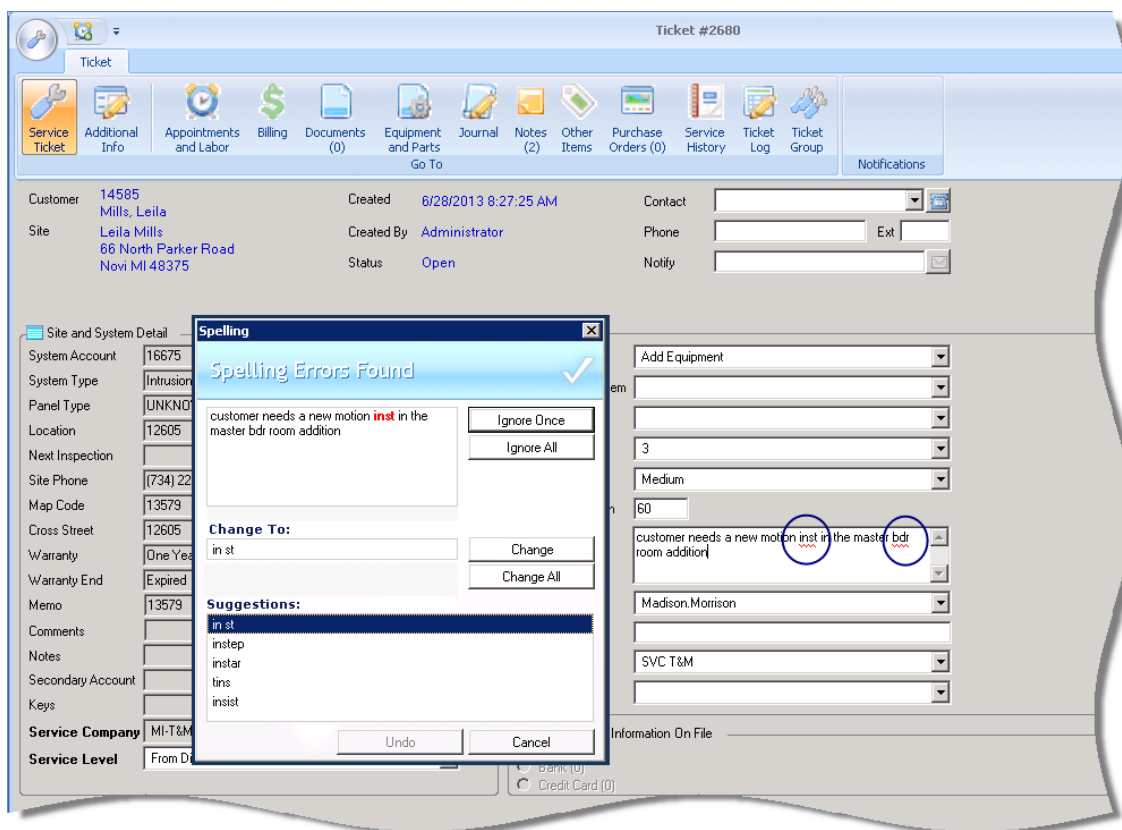
Spelling Check

Spelling Check has been added to SedonaService. If an error is detected in the spelling of a word, the word(s) in question will be underlined in red. Also, a Spelling Error Found dialog box will be displayed for the User to locate the correct spelling. If the User does not want to use the spelling suggestions, they can click on the Cancel button or click on the “X” at the top right of the dialog box to close.

Below are the rules of where and how the Spelling Checker is designed to function.

Service Ticket Form – Comments field: When tabbing off the Comments field, the Spelling Check suggestion dialog box will be displayed to the User if any misspelled words are detected.

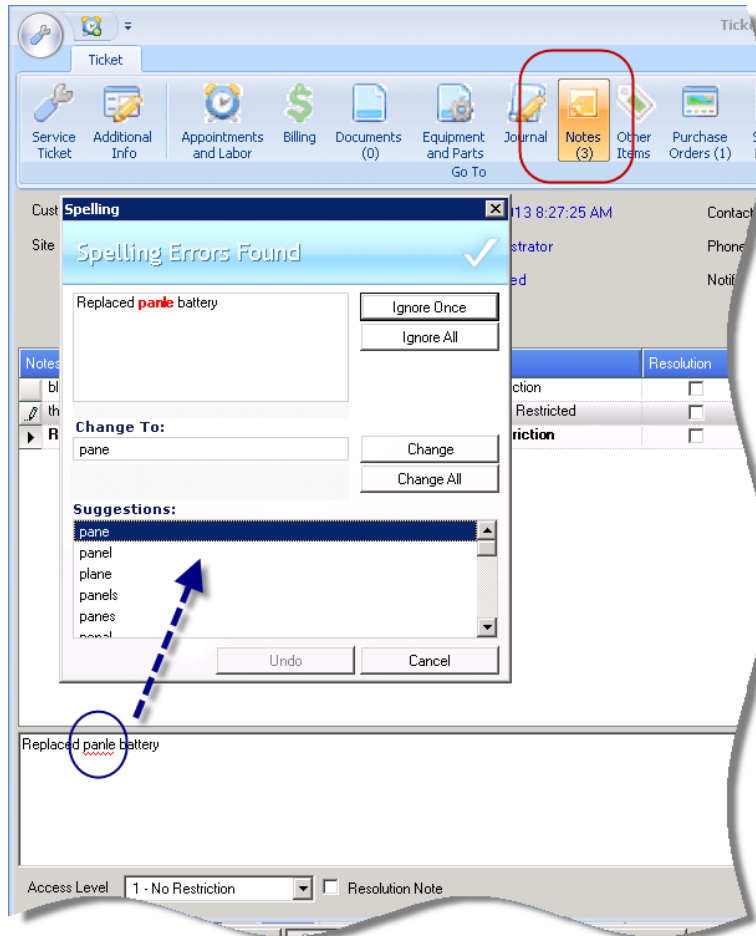
Notes – When typing in a Note, if a misspelled word is detected, the word in question will be underlined in red. When pressing the Enter key on the keyboard while still within the Note text box, the Spelling Check suggestion dialog box will be displayed to the User.



Application Enhancements/Improvements (continued)

Spelling Check (continued)

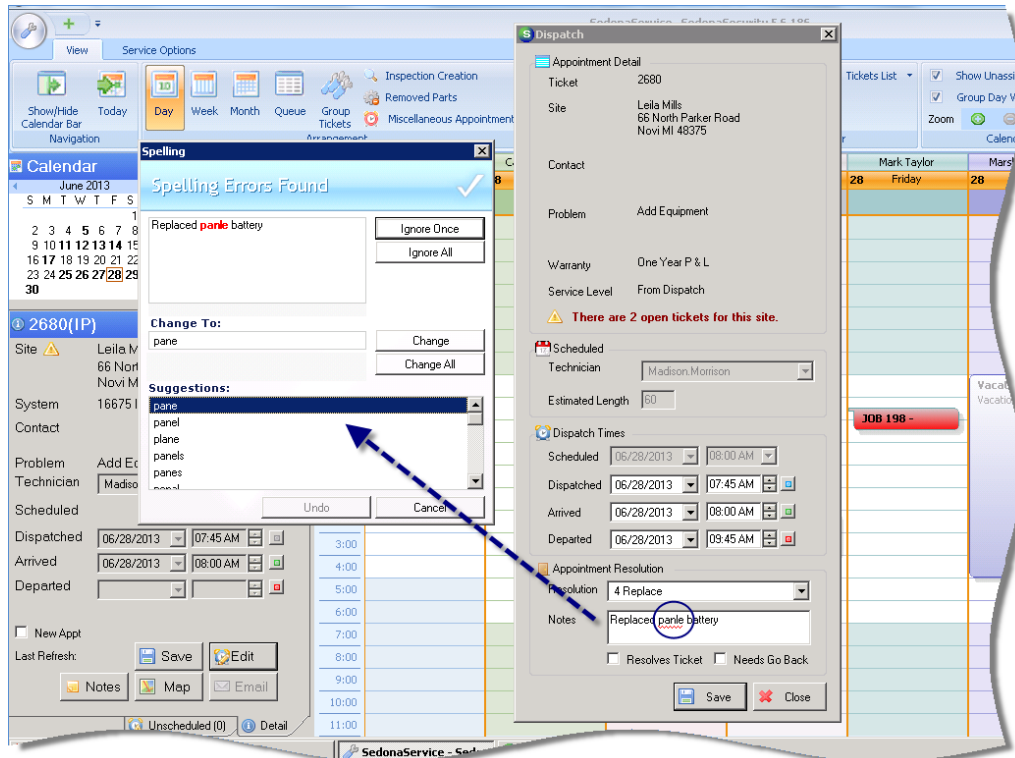
Notes – When typing in a Note, if a misspelled word is detected, the word in question will be underlined in red. When pressing the Enter key on the keyboard while still within the Note text box, or when clicking on the Save button, the Spelling Check suggestion dialog box will be displayed to the User.



Application Enhancements/Improvements (continued)

Spelling Check (continued)

Dispatch – When typing in a Resolution Note within the Ticket Dispatch form, if a misspelled word is detected, the word in question will be underlined in red. When clicking on either the Resolves Ticket or Needs Go Back checkboxes or when clicking on the Save button, the Spelling Check suggestion dialog box will be displayed to the User.



Application Enhancements/Improvements (continued)

Notes Access Level

A change has been made to the SedonaService application which will now automatically default the Access Level 2 to any note entered into a Ticket. The User may override the defaulted Access Level if needed. As always, Notes entered and marked as the Resolution Note will always save as an Access Level 1.

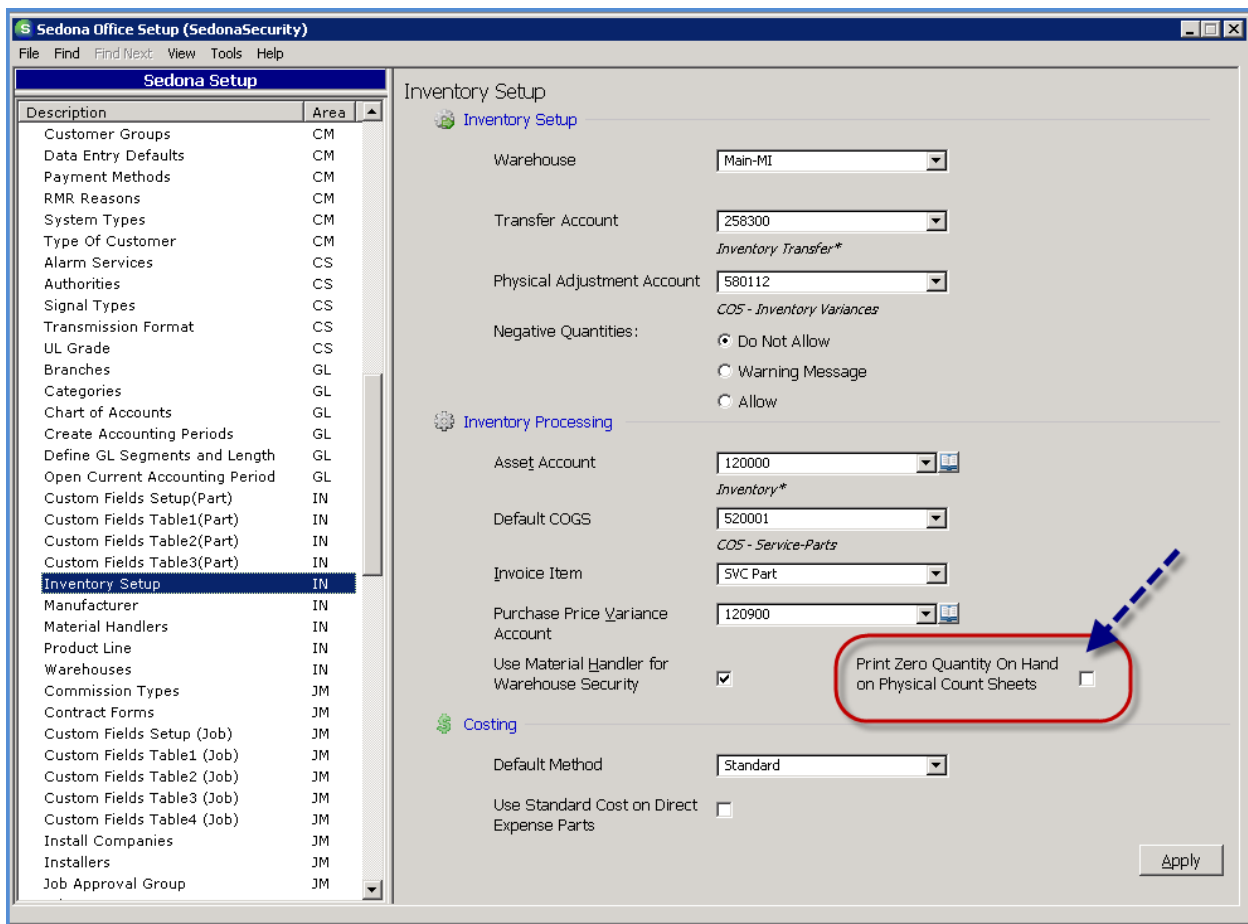
Application Enhancements/Improvements (continued)

SedonaSetup

Inventory

A new option has been added to the Inventory Setup form labeled “Print Zero Quantity On Hand on Physical Count Sheets”. If this option is **not** checked, when printing physical inventory count sheets, any parts with an on-hand quantity of zero will be excluded from printing. Parts with negative on-hand quantities will print on the count sheets.

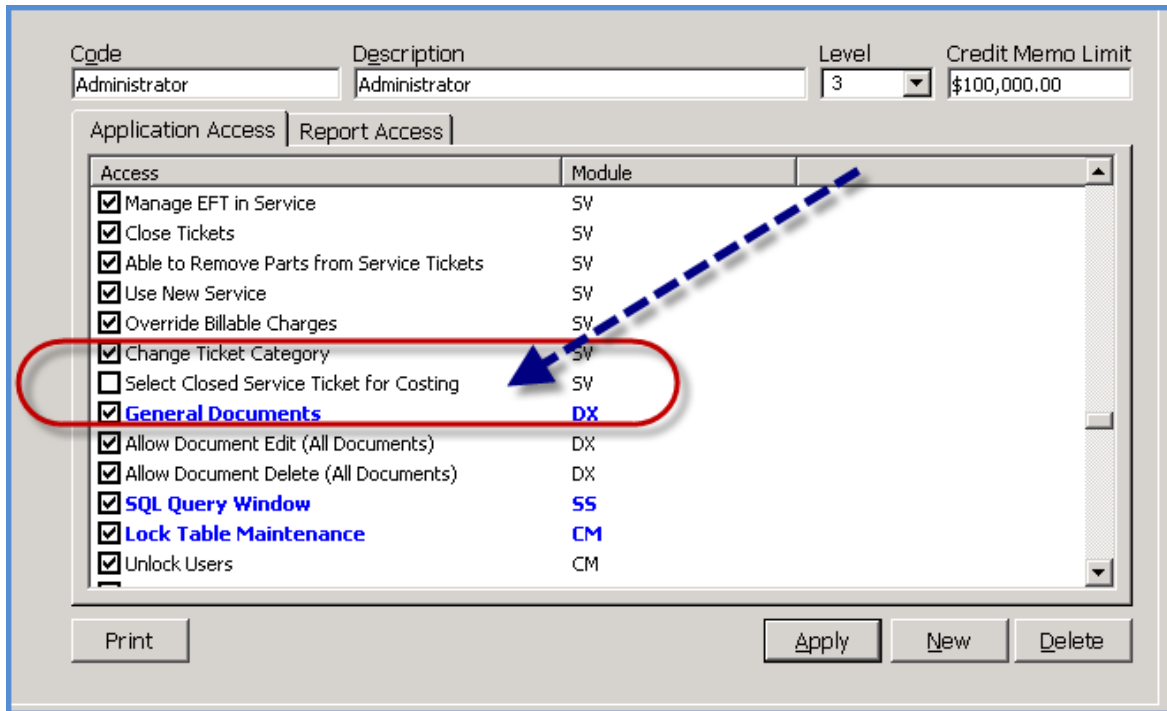
When updating to version 5.6.185, this option is not checked by default.



Application Enhancements/Improvements (continued)

User Group Security

A new security option has been added to the SV section on the Application Access list. This new option is titled “Select Closed Service Ticket for Costing”. If this option is selected for the User Group, the User will be able to select a Closed Service/Inspection Ticket when entering an A/P Bill, a Purchase Order, Repair Order Receipt, or a Purchase Order Receipt.



Application Corrections

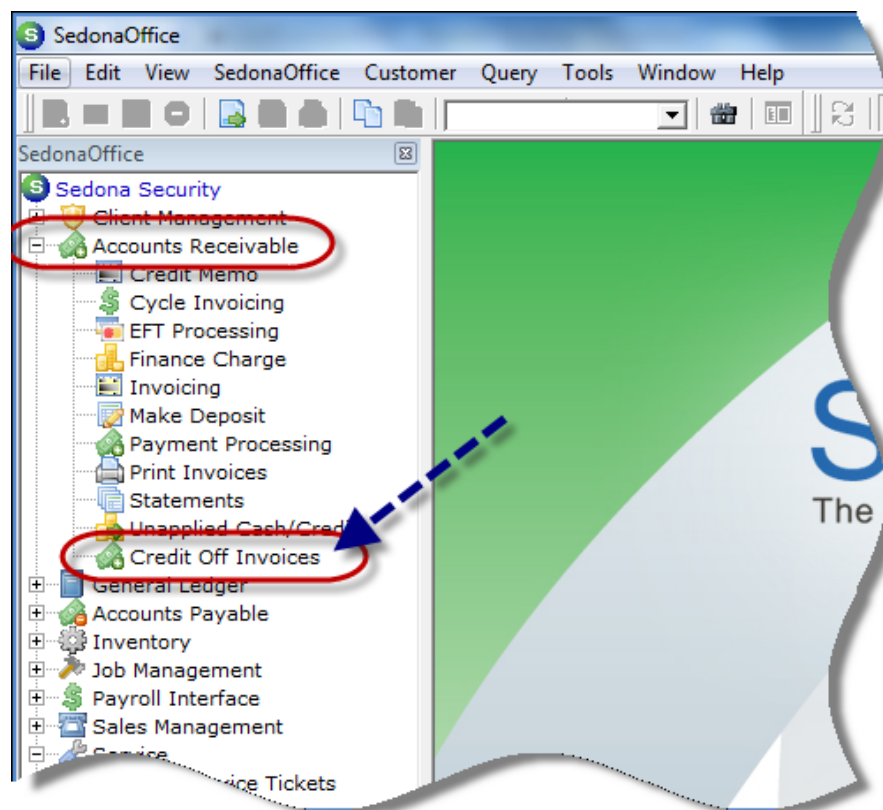
Accounts Payable

- **Voiding an A/P Check:** Corrected a reported issue; voiding a check would cause a one-sided G/L entry.

Application Corrections (continued)

Accounts Receivable

- **Subaccount Invoices:** Corrected a reported issue; when creating an invoice for a Subaccount that bills to the Master Account, if the Master Account had more than one billing address, the Master Account primary Billto Address would at times not be correctly selected.
- **EFT Batches:** Corrected a reported issue; batches returned from ACH Direct were not always properly flagged as “RETURNED”.
- **Credits for Service Invoices:** Corrected a reported issue; when crediting off a Service Invoice with any available method within the application, the Service Ticket Number was not being displayed in the header of the Credit Memo.
- **Credit Off Invoices:** Corrected a reported issue; when using the Credit Off Invoices feature, the Category selected in the write-off form was not saving to the GL transaction Register.



Application Corrections (continued)

Client Management

- **Deleting a Site:** Corrected a reported issue; Users were able to delete the Site on a Customer if it was the only site attached to the customer.

Application Corrections (continued)

Job Management

- **Custom Job Timesheet Import:** Corrected a reported issue; after a timesheet batch import was done, no editing or deleting was allowed. Attempting to edit or delete a record imported was cause the application to close.

Application Corrections (continued)

Sales Management

- Changes were made to the QuoteWerks integration to help prevent QuoteWerks from losing its knowledge of a quote already being imported.

Application Corrections (continued)

SedonaService

- **Viewing Service Invoice:** Corrected a reported issue; when clicking on the View Invoice button on the Ticket Billing form when the main SedonaOffice application was minimized would cause a system error.
- **Service Ticket Printing:** Corrected a reported issue; Site phone numbers were not printing properly if the site phone contained an extension number.