SedonaOffice

The #1 Financial Software for Security Companies

SedonaOffice Release Notice

SedonaOffice

Version 5.6.189

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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 5.6.186. This is an intermediate version update that contains new features and application corrections.

Table of Contents
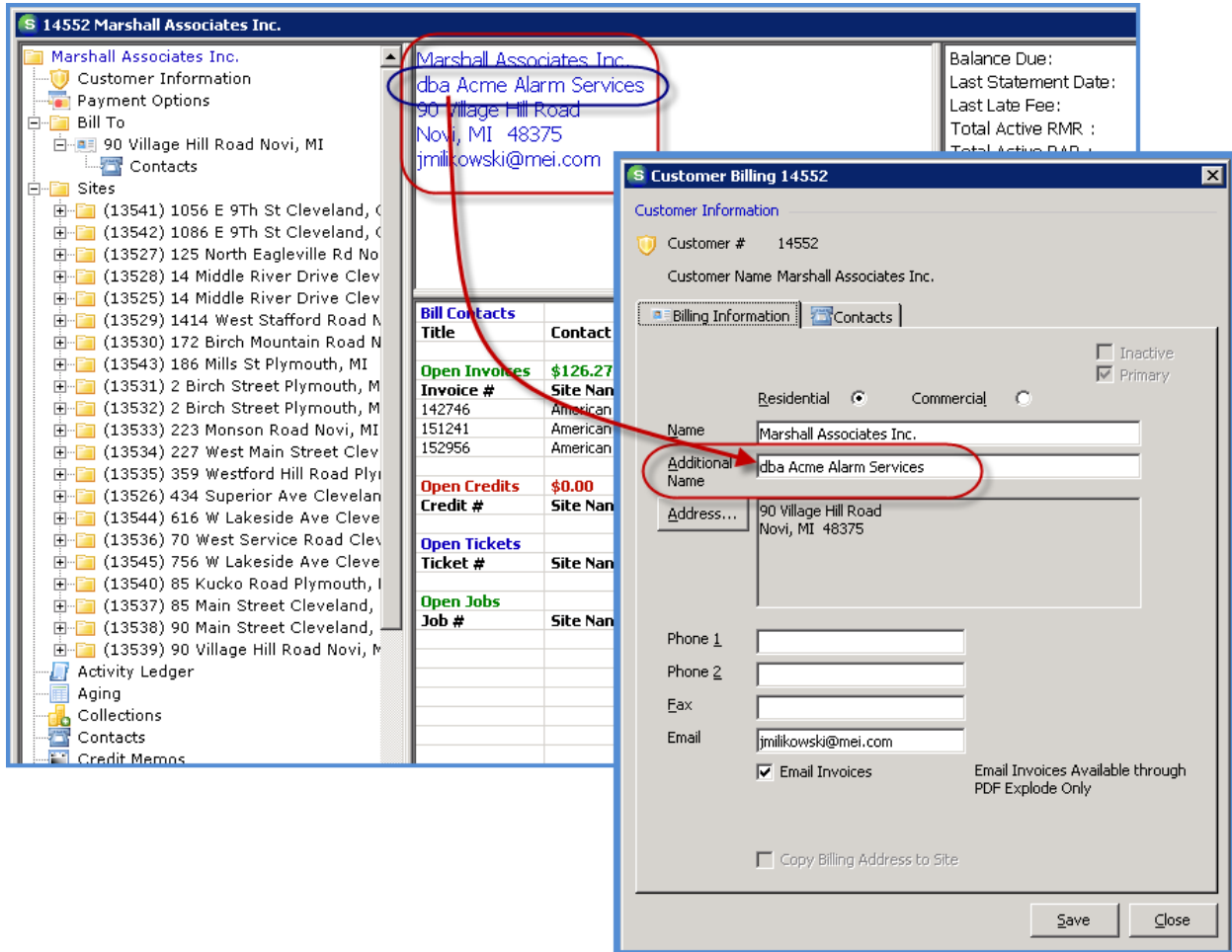
Application Enhancements/Improvements

Client Management

BillTo Additional Name

Any information entered into Additional Name field on the primary BillTo will be displayed as the second line in the Customer Explorer.

Application Enhancements/Improvements (continued)

Inventory

Issue/Return Parts

An enhancement has been made to the Issues/Returns form to add a new field labeled Phase Code. If a User is issuing or returning parts to a warehouse for a Job, the User will select the appropriate Phase Code for the issue/return transaction.
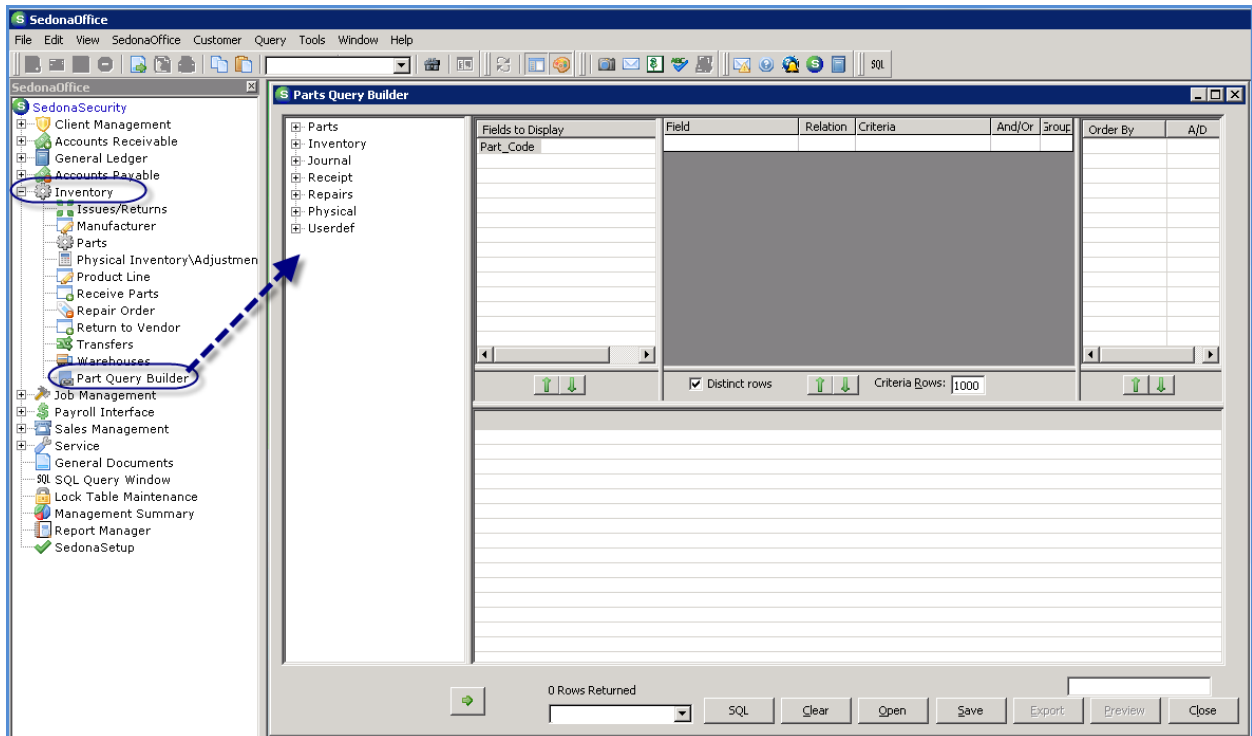
Job Parts Issue

Job Parts Return to Stock

Application Enhancements/Improvements (continued)

Parts Query Builder

A new Query Builder tool has been added to the SedonaOffice application as of version 5.6.189, the *Part Query Builder*. The Part Query Builder operates on the same principles as all the other Query Builder tools available within the SedonaOffice application.

Access to this new tool is controlled by User Group Security. If the User Group is granted this permission, a new option, Part Query Builder, will be displayed on the main application menu tree within the Inventory module.

Note: This new Query Builder is being released in Beta mode. There will be additional changes made in future software releases.

Application Enhancements/Improvements (continued)

Job Management

Job Part/PO/Issue Phases

An enhancement has been made to the application in regards to the manner in which parts are issued to Jobs where there are multiple phases assigned to parts on the Job Materials List.

Job Purchase Orders

When Purchase Orders for Parts are created within the Job record, the User specifies which phase is being ordered.

When the Purchase Order is received, using either the Direct Expense or Receive/Issue Immediately option, the corresponding Part/Phase issued quantity on the Job Materials List will be updated.

Issue Parts from Stock with Phases

When issuing parts from stock to Jobs with multiple phase codes, and the issue transaction is done within the Job record, the User will be presented with a new *Phase Code* field. The User selects the appropriate Phase Code from the drop-down list.
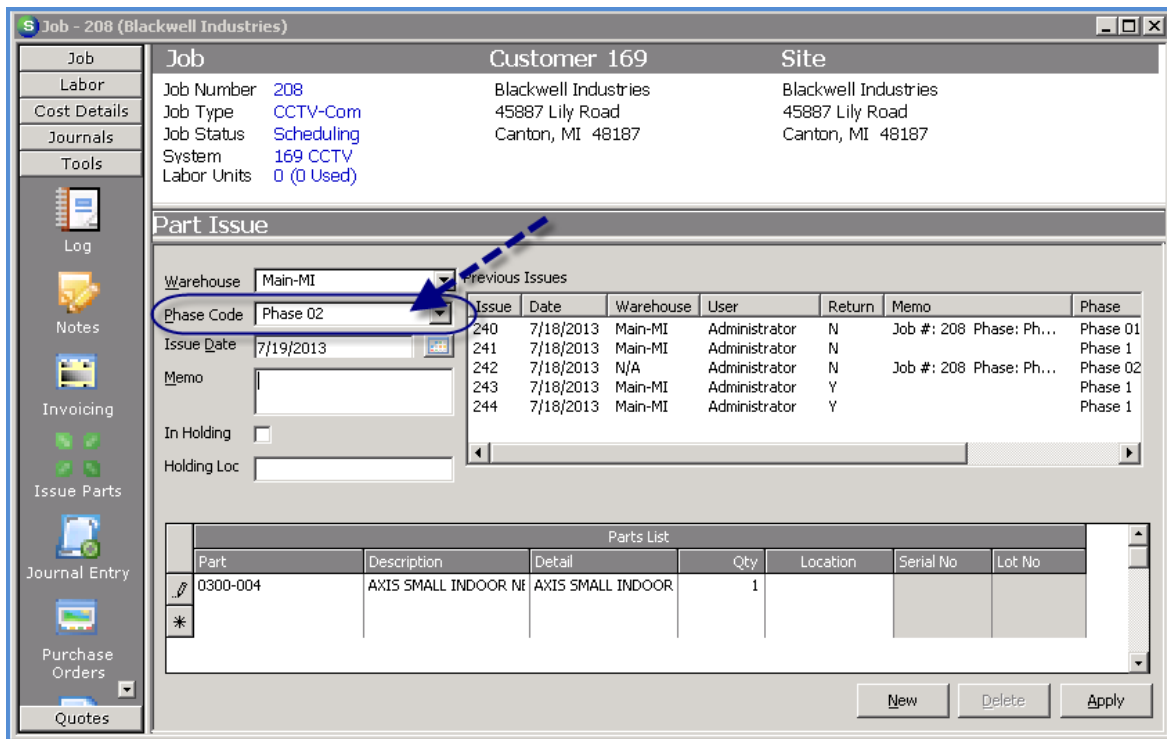
Application Enhancements/Improvements (continued)

Job Materials – Part Documents

A new button has been added to the Job Materials list labeled *Documents*. When highlighting a line in the Materials List then clicking on the Documents button, any documents attached to the Part (SedonaDocs) will be displayed in the Documents Search form. Double-clicking a document will open the item for viewing.
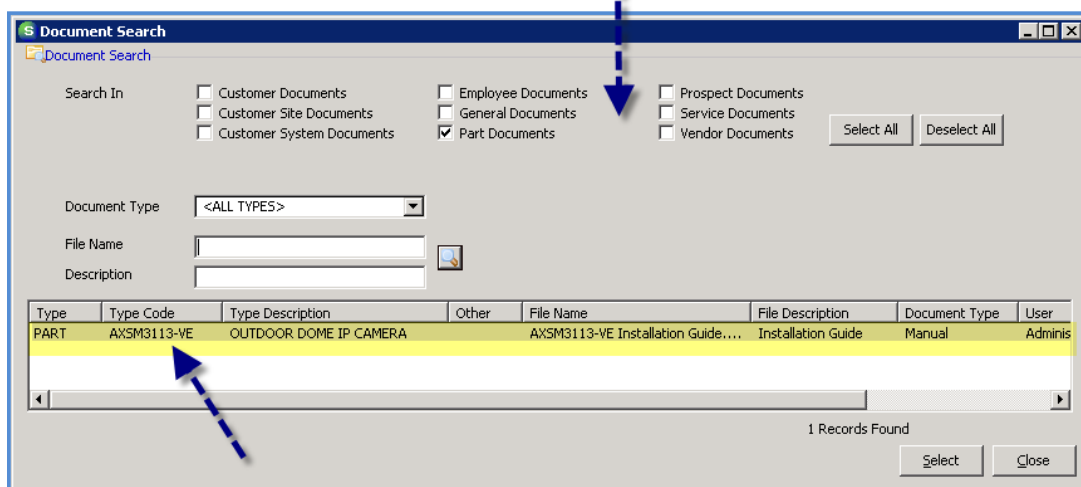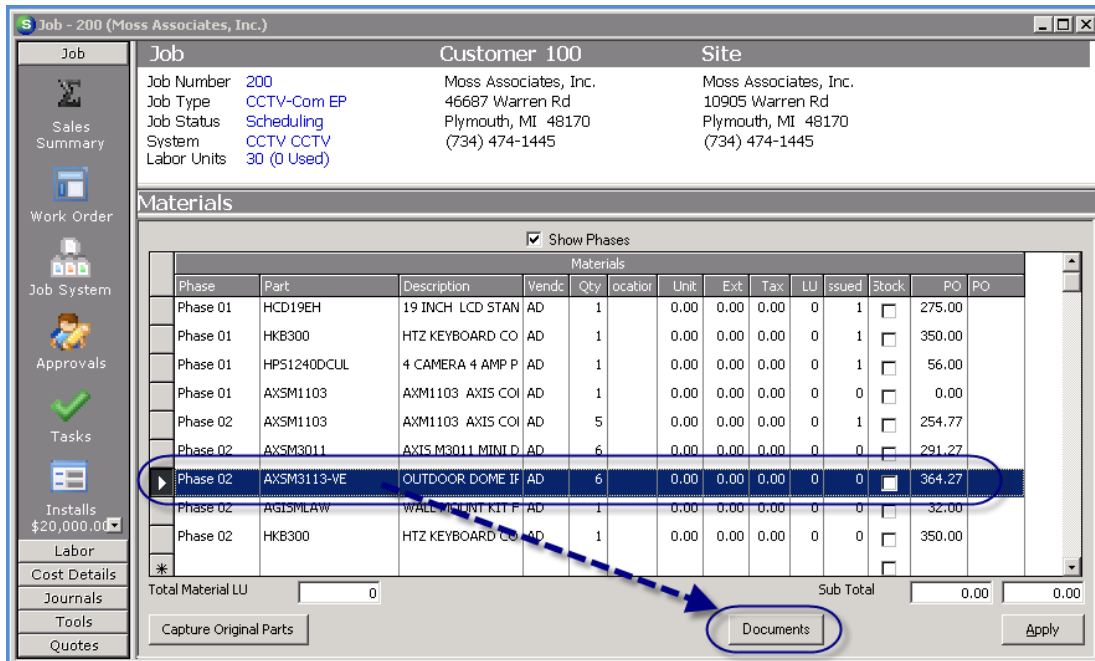
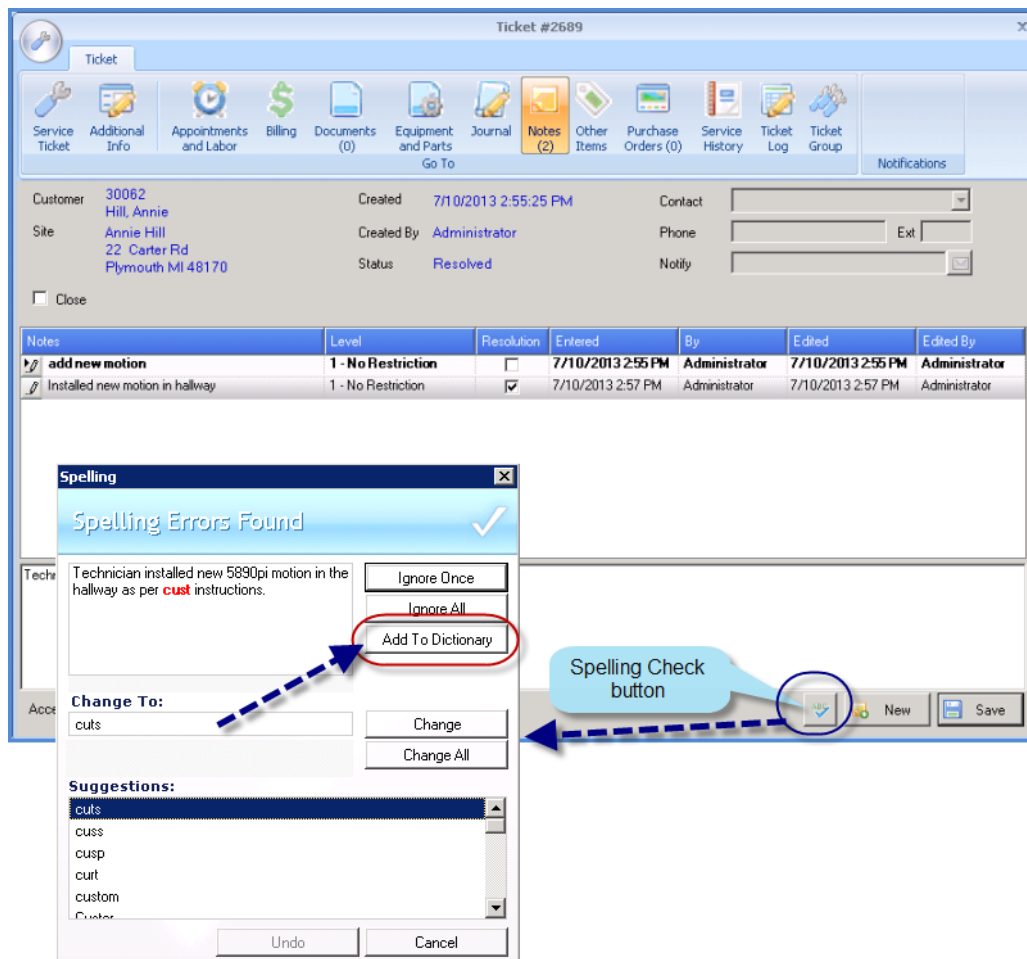*Application Enhancements/Improvements (continued)*

SedonaService

Spelling Check

Spelling Check was introduced to SedonaService in version 5.6.186. Included in that release, the Spelling Suggestion dialog box would pop-up when tabbing off a field where a misspelled word was detected. Due to an overwhelming amount of feedback from the SedonaOffice customer base, we have modified this feature.

With the release of 5.6.189, the Spelling Check has been modified to:

1. The Spelling Suggestion dialog box will only displayed on demand by the User; a new Spelling Check button has been added to several forms within SedonaService. It is the User's decision whether to click this new button to check the spelling.
2. If a misspelled word is detected, it will still be underlined with a squiggly red line.
3. The spelling suggestions dialog box now contains an "Add to Dictionary" button that saves each word to %AppData%\SedonaOffice\Infragistics.UserDictionary.dict text file.
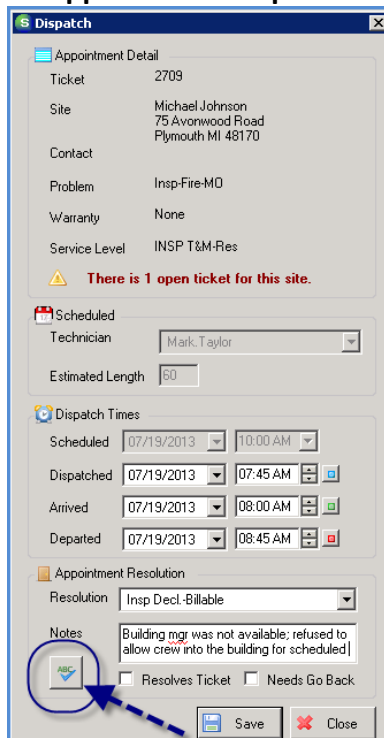
Application Enhancements/Improvements (continued)

Spelling Check (continued)

The new Spelling Check button has been added in following areas:

Ticket Notes
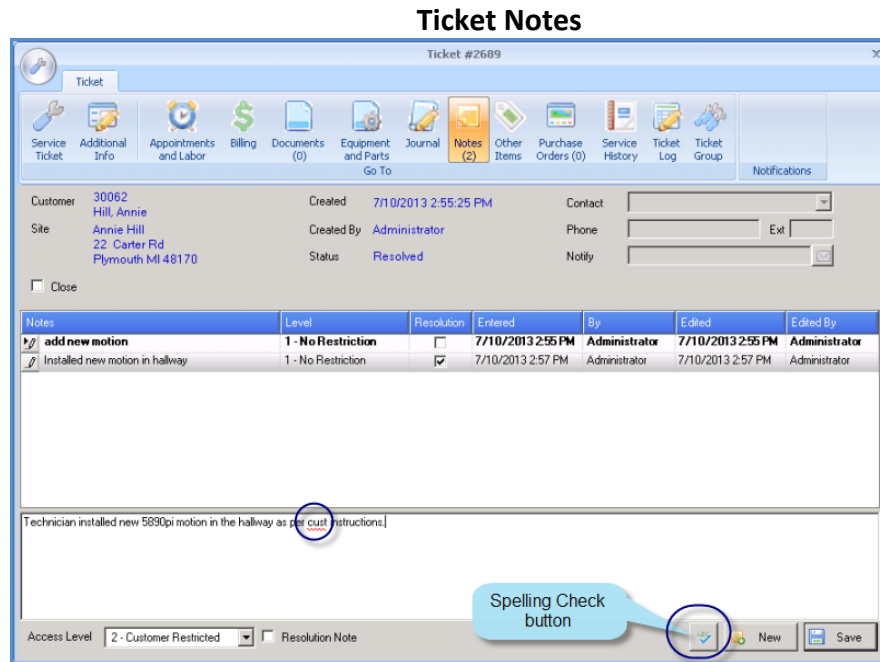
Appointment Dispatch

Application Enhancements/Improvements (continued)

Spelling Check (continued)

Service Ticket Form/Comments Field

Application Enhancements/Improvements (continued)

SedonaService

Service Ticket Printing (single tickets)

The Service Ticket Printing Preferences form has been modified:

1. The printing options have been rearranged into the order in which they would print on the Service Ticket Report. Some of the labels have been changed, which now changes the on/off meaning of the option. Please see the screen shot below for a comparison of the before version 5.6.189 vs. the new layout.
2. A new option has been added to the Printing Preferences; the option is labeled "*Show Zone List*". Zone information will only print if your company has activated Central Station Tracking in SedonaSetup/Setup Modules and you are manually entering zone information for Systems.
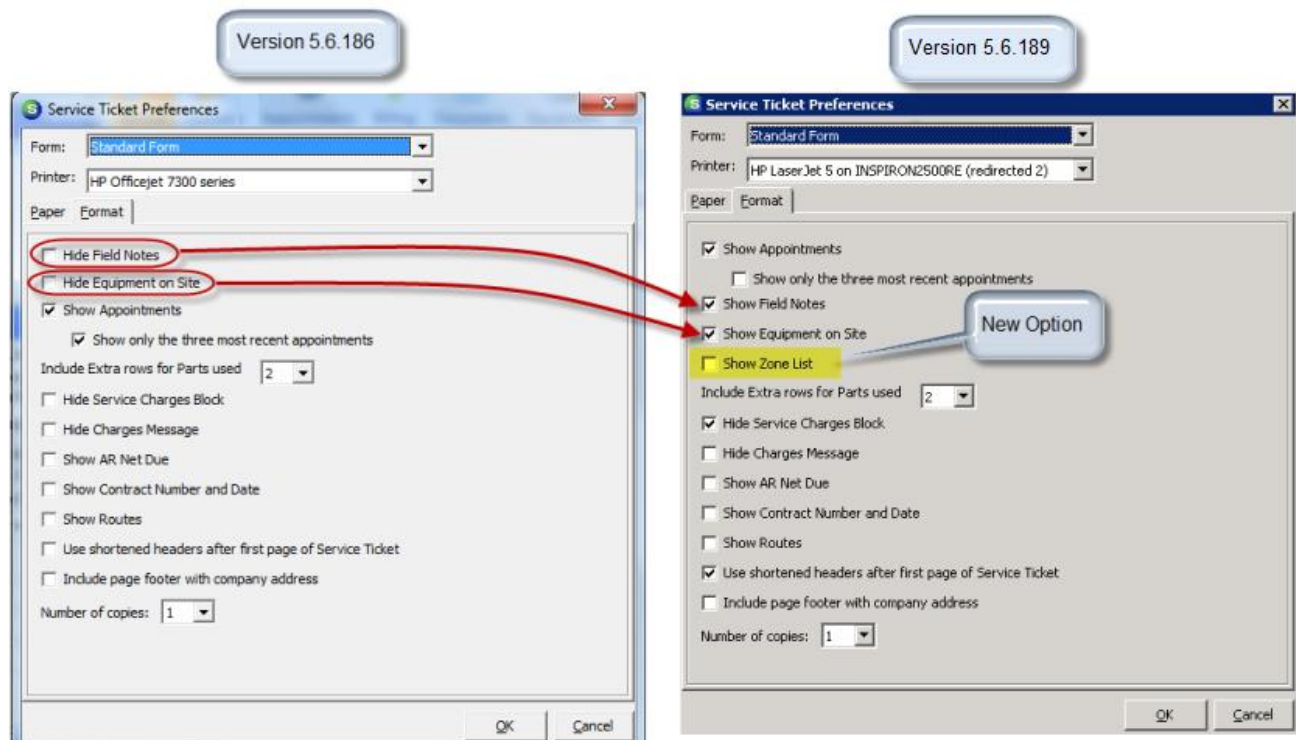
Application Enhancements/Improvements (continued)

SedonaSetup

User Group Security – AP Edit Existing Transactions – PO Security

A change has been made to the existing User Group Security option *AP Edit Existing Transactions*. Purchase Order security is now linked to this security permission. If a User has access to Purchase Orders and has been granted the permission AP Edit Existing Transactions, the User will be able to modify Purchase Orders. If the User is not granted this security permission and has access to Purchase Orders, the User will be able to access Purchase Orders in read only mode.

Note: SedonaOffice customers using Material Handler Security, if the User is a Material Handler, and has permission to create purchase orders (AP Purchase Orders), but does not have the permission for AP Edit Existing Transactions, then the User will not be able to modify a Purchase Order once it has been created/saved.

Application Enhancements/Improvements (continued)

SedonaSetup (continued)

User Group Security – AP Override Expense Type

The *AP Override Expense Type* security permission has been reactivated. This permission controls whether a User is able to change the Expense Type on Purchase Orders, PO Receipts, Return to Vendor transactions, Repair Orders, A/P Bills and A/P Credits.

Application Enhancements/Improvements (continued)

SedonaSetup (continued)

User Group Security – IN Part Query Builder

A new option has been added to User Group Security within the IN permissions group, ***Part Query Builder***. Only User Groups that have been granted this new permission will have access to this new query builder tool.
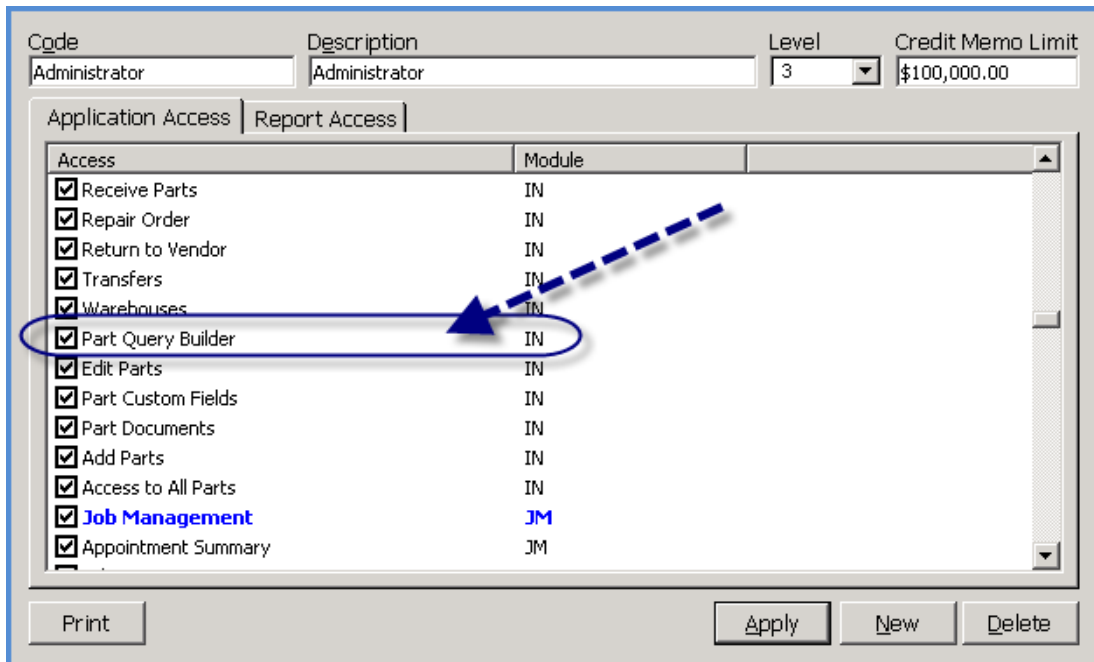
Application Enhancements/Improvements (continued)

SedonaSetup (continued)

Service Setup Defaults

Two changes have been made to the Service Setup Defaults:

1. A new tab has been added to this setup form; this new tab labeled "GL Setup" contains G/L related setup options for service.
2. A new option has been added to the Service Setup Defaults, "*Note Access Level*". This new option allows you to determine the default security access level for all new notes created on Service and Inspection Tickets.
    This default Note Access Level will determine which Notes will be printed on Tickets. For example if your company default note access level is set to 2, then all level 1 and level 2 notes will print on Tickets.
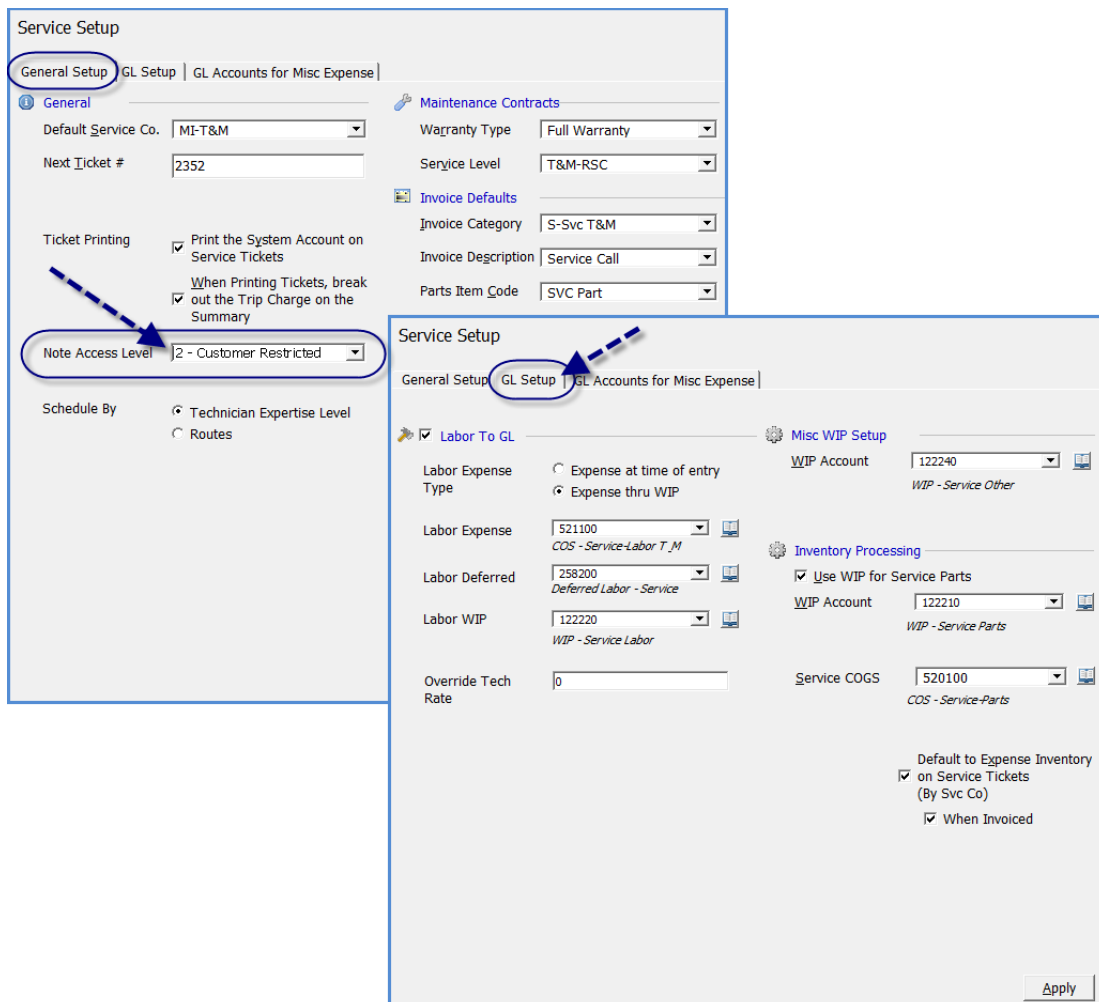
Application Corrections

General Ledger

- Journal Entries with Multiple Job Numbers: Corrected a reported issue; when creating a Journal Entry and multiple Job Numbers are entered, the posting would only affect the first Job Number found. This has been corrected.

Inventory

- **Physical Inventory**: Corrected a reported issue; in version 5.6.186 the new Inventory Setup option introduced, "Print Zero Quantity On Hand on Physical Count Sheet" would not allow a User to add an existing part to the count sheet if this option was selected.

Job Management

- **Change Orders**: Corrected a reported issue; in version 5.6.186, an error message was received when trying to create more than 5 change orders on a job.
- **Job Ticket**: Corrected a reported issue; when printing a Job Ticket, the total for Job Timesheets was not displaying the correct total.
- **Materials List/PO's/Job Phases**: Corrected a reported issue; if the same part is ordered for multiple phases, the issued quantity column on the Job Materials List was not being updated properly.

SedonaService

- **Ticket Status**: Corrected a reported issue; the Service Ticket Status was not always being updated to the correct status when multiple Technicians were involved, and/or a ticket resolution code was removed and additional appointments were scheduled.
- **Service Provider & Technician Appointments:** Corrected a reported issue; tickets where both a Service Provider and a Company Technician had been scheduled and dispatched encountered problems in the Technician name display.
- **Parts on Ticket:** Corrected a reported issue; If the company Inventory default is set to not allow negative values, if you select a part on a ticket where there are zero parts on-hand in the selected warehouse the application would not allow the part to be saved to the ticket. The application has been changed to do the following: the User un-checks the issue from stock checkbox which will allow the part to be saved to the ticket. This will then allow the User to create a PO for the part from within the ticket.

Application Corrections (continued)

SedonaService (continued)

- **Sales Tax for Parts**: Corrected a reported issue; If the Ticket Service Level has been linked to an Invoice Item for Parts on the Service Level/Parts tab in SedonaSetup, this Invoice Item was not being honored for the calculation of sales tax.
- **Ticket Equipment & Parts:** Corrected a reported issue; when navigating to the Equipment and Parts form, if there was not a list of existing equipment on site, the horizontal scroll bar that separates the equipment list from the parts (used) list would be at the bottom of the form and would have to be moved for each ticket. SedonaService will now remember the last placement of the horizontal scroll bar when logging out of the application.
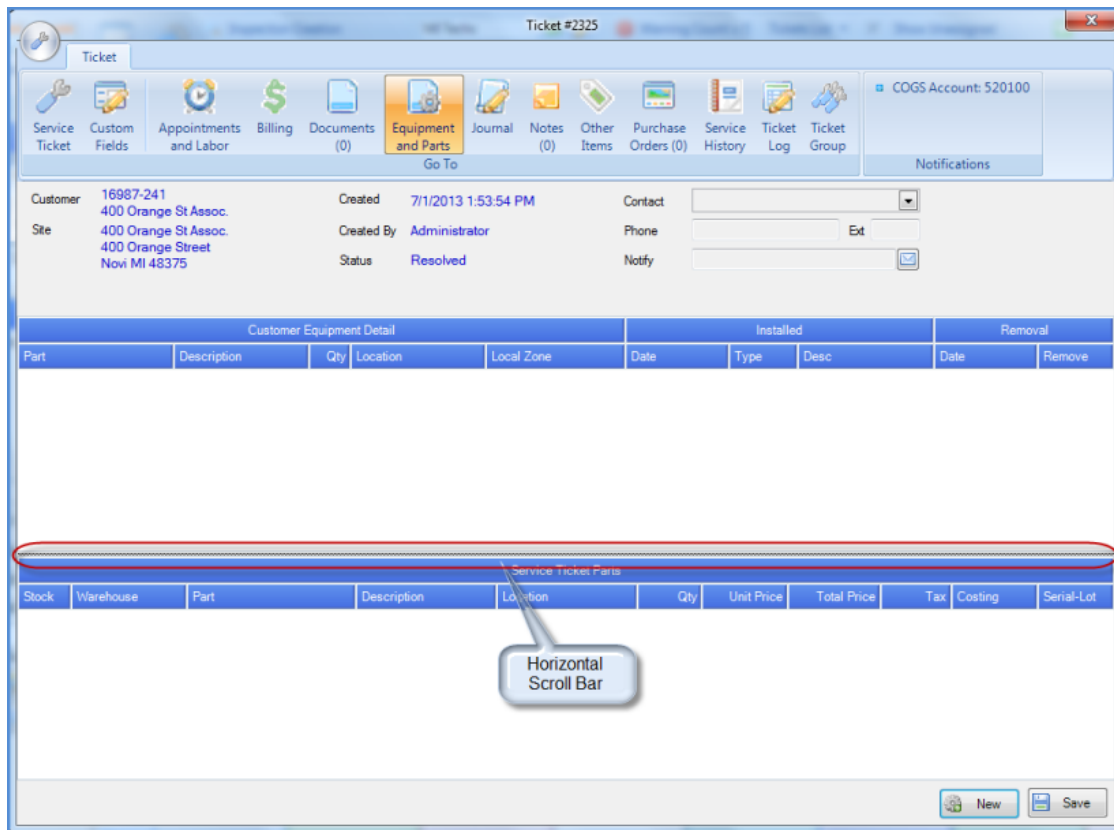
Application Corrections (continued)

Report Manager

- **GL Register Entries Report**: Corrected a reported issue; when selecting one particular G/L Account and one particular Register Type, the report was displaying all Register Types for the GL Account and period of time selected.