



SedonaOffice Release Notice

SedonaOffice

Version 5.6.191

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

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Application Enhancements/Improvements

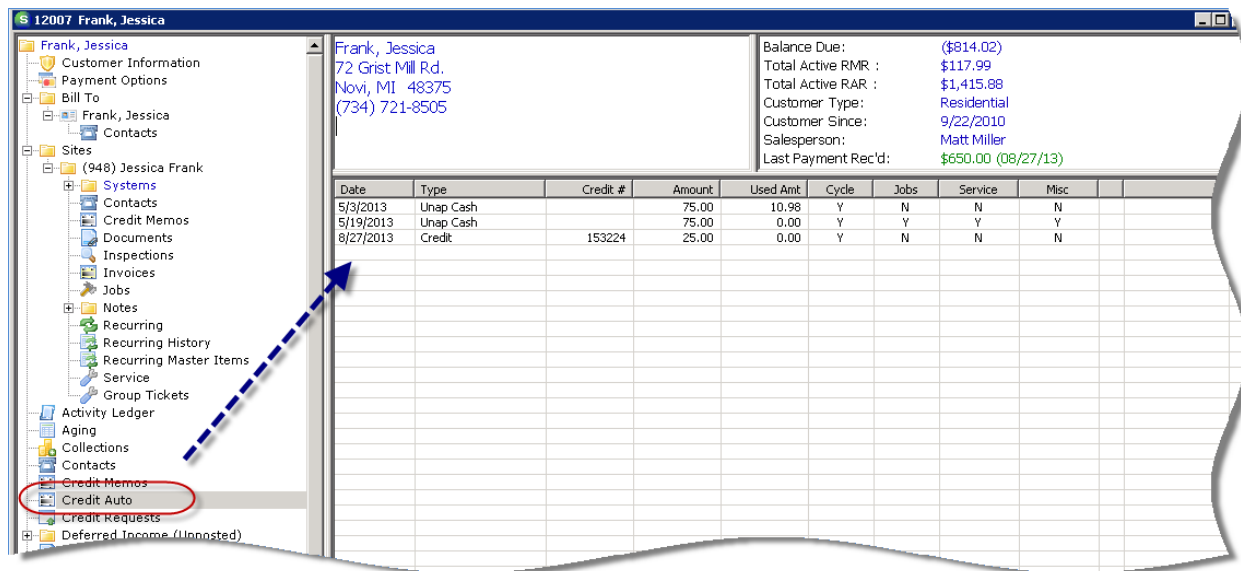
Client Management

Credit Auto

A new menu option, *Credit Auto*, has been added to the Customer Explorer tree.

This new option serves two main purposes:

- 1) Display a listing of any Unapplied Cash or Unapplied Credit Memos that have been flagged for future application to specific invoice types.
- 2) Ability to change the Future Apply setting to different invoice types or completely remove the Future Apply flags from the unapplied item.

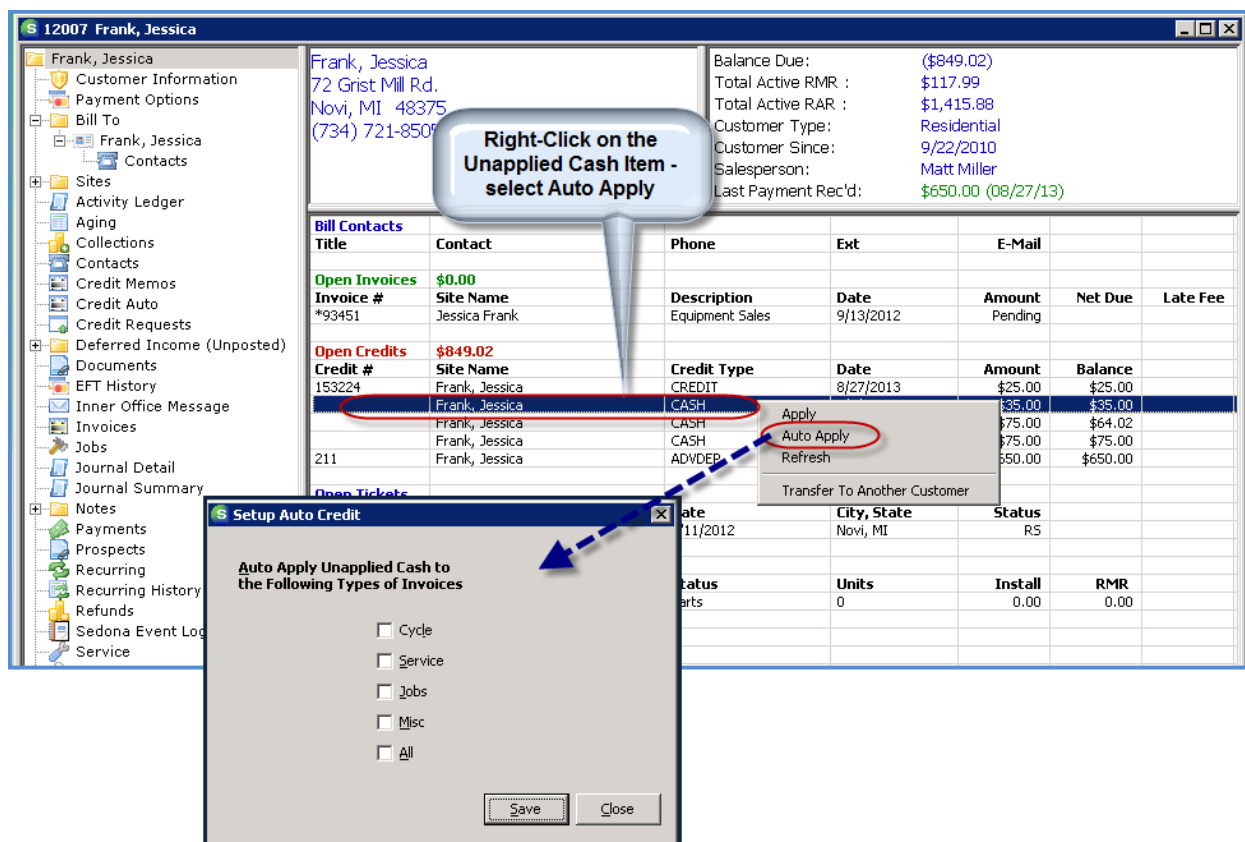


Application Enhancements/Improvements (continued)

Auto Apply Unapplied Cash

New functionality has also been added which allows a User to flag an Unapplied Cash item for future application. Previously this could only be done during the payment posting process and could not be changed once the payment batch had been deposited.

From the Customer Explorer, highlight the Unapplied Cash item you wish to Auto Apply to future invoices; right-click and select the Auto Apply option. The Setup Auto Credit form will be displayed. The User may select any or all of the invoice types listed.

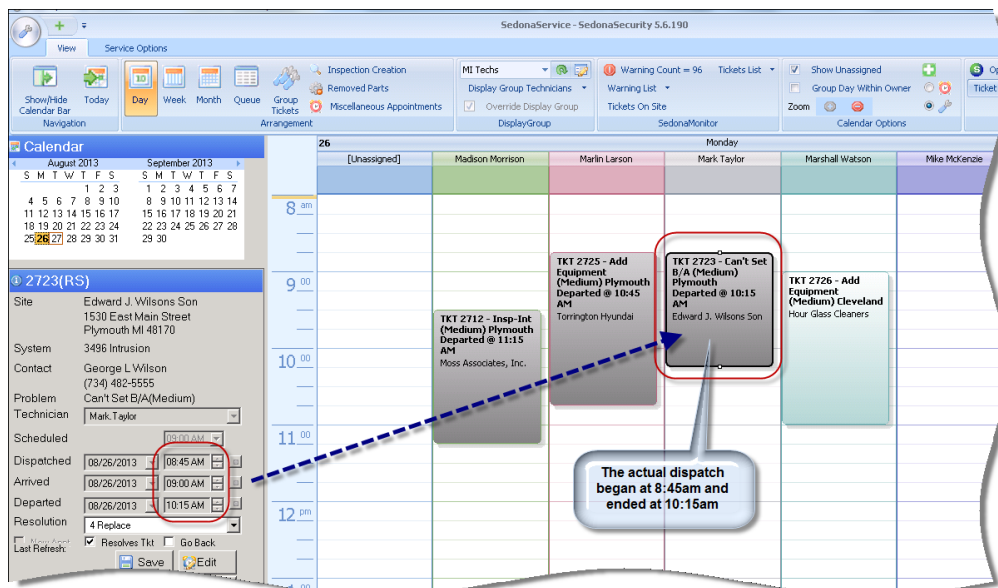
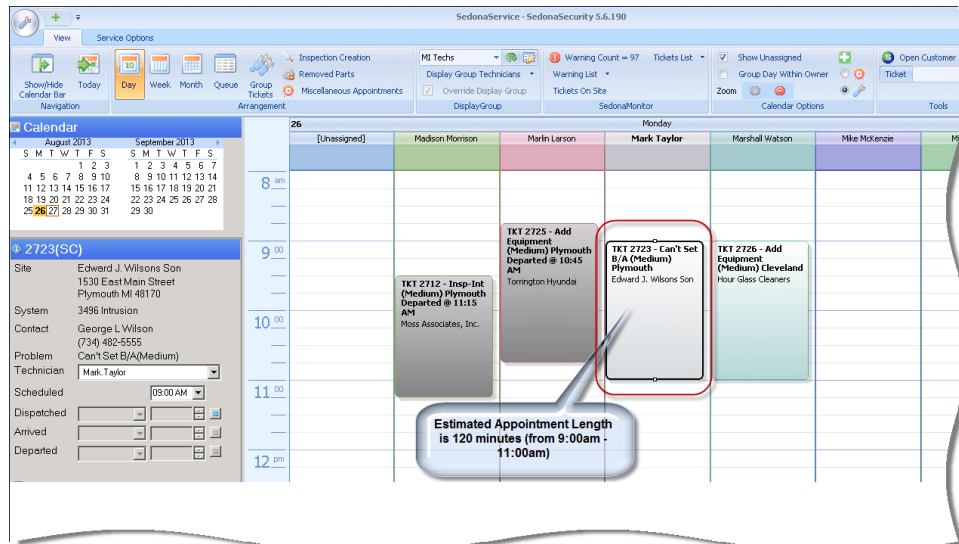


Application Enhancements/Improvements (continued)

SedonaService

Service Schedule Board Enhancement

An enhancement was made to the Service Schedule Board in how dispatched appointments are displayed. Once a technician has departed from a dispatch, the Schedule Board will show the appointment block properly sized to the span **between the dispatch time and the departed time**. Until the technician has departed, the appointment block size is governed by **the scheduled time and the estimated appointment length**. This change was made to provide a visual tool for viewing the current availability of Technicians as well as the ability to analyze Technician performance.



Application Enhancements/Improvements (continued)

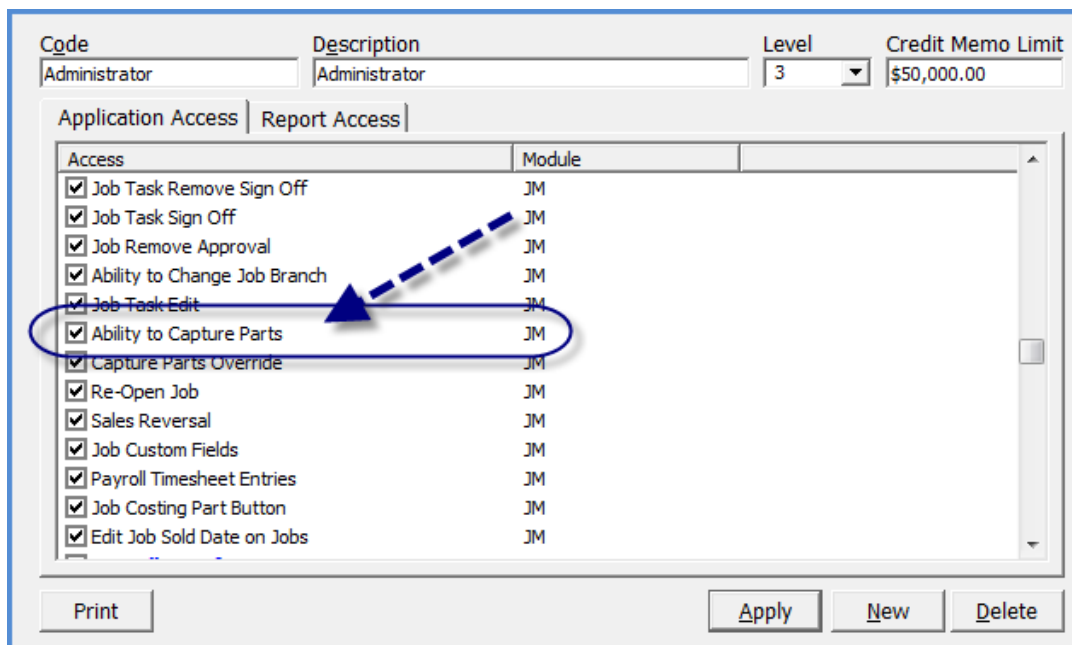
SedonaSetup

User Group Security – JM Capture Parts

A new security option, *Ability to Capture Parts*, has been added to the JM area of User Group Security. If this option is selected a User will be able to click on the Capture Parts button on the Job Materials List.

Prior to version 5.6.190, if a User has been assigned the Capture Parts Override permission, they will also need to be assigned this new permission to have access to the Override Parts Capture button on the Job Materials List.

Important Note: Prior to 5.6.190, the Capture Parts Override permission controlled both the ability to Capture Parts as well as Override the Parts Capture – these are now two separate permissions. For Users that need the ability to Capture Parts who were previously able to do so, make certain they have been assigned the new security option *Ability to Capture Parts*. You may want to re-evaluate your current permission settings to determine which User Groups should be assigned the Override permission.



Application Enhancements/Improvements (continued)

Report Manager

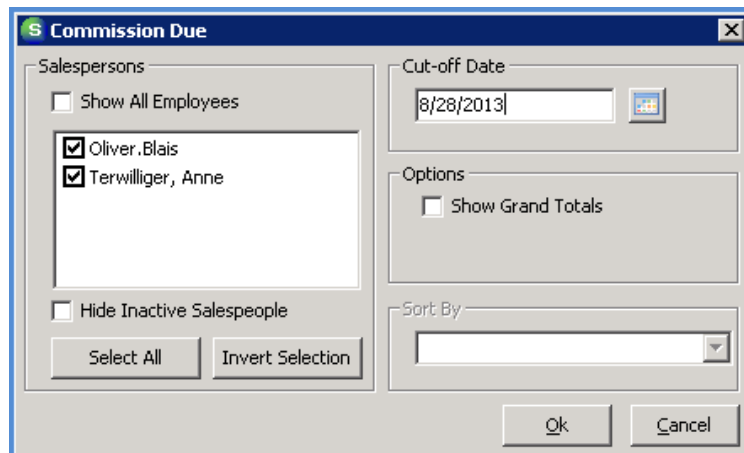
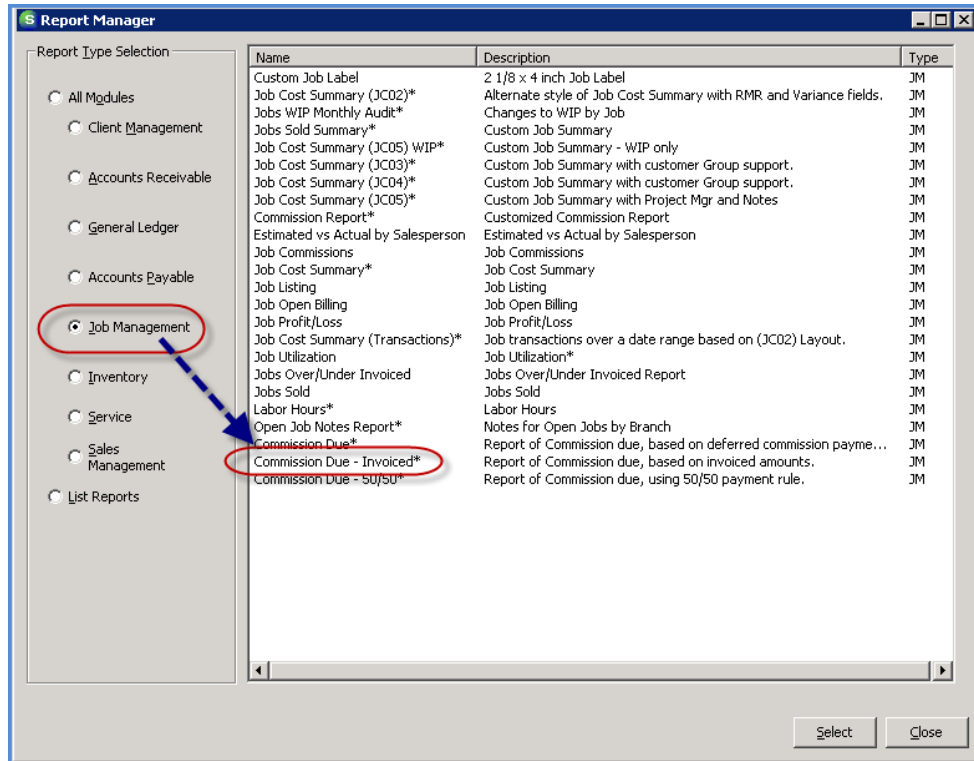
Three new reports have been added to the Report Manager. All three of these are custom reports, however, as always all SedonaOffice customers have access to standard and custom reports. All reports are controlled by User Group Security permissions. A sample of each report is provided on the following pages.

- **Commission Due – Invoiced***
- **Closed Service Ticket Cost – Not Invoiced***
- **Technician Performance (Time)***

Application Enhancements/Improvements (continued)

Commission Due – Invoiced*

The layout of this new report is similar to the Commission Due 50/50* Report. This report is designed to calculate commissions due based upon Job Invoiced amounts and the percentage of the Job that has been invoiced as of a particular date. If the Job has been invoiced 1%, then the report will show that 1% of the Job Commissions are due.



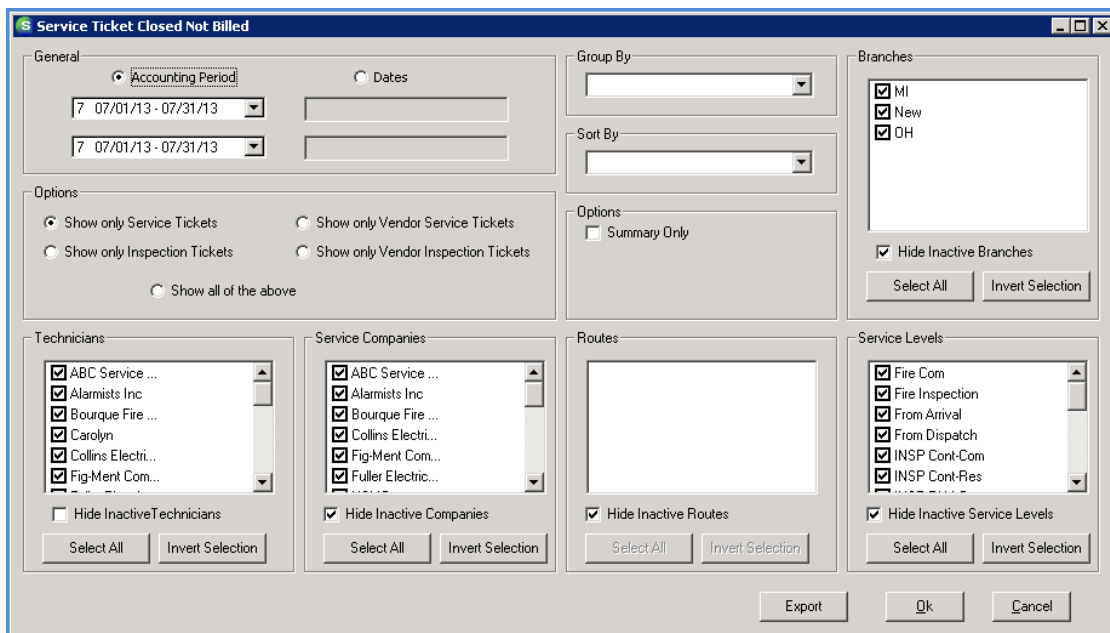
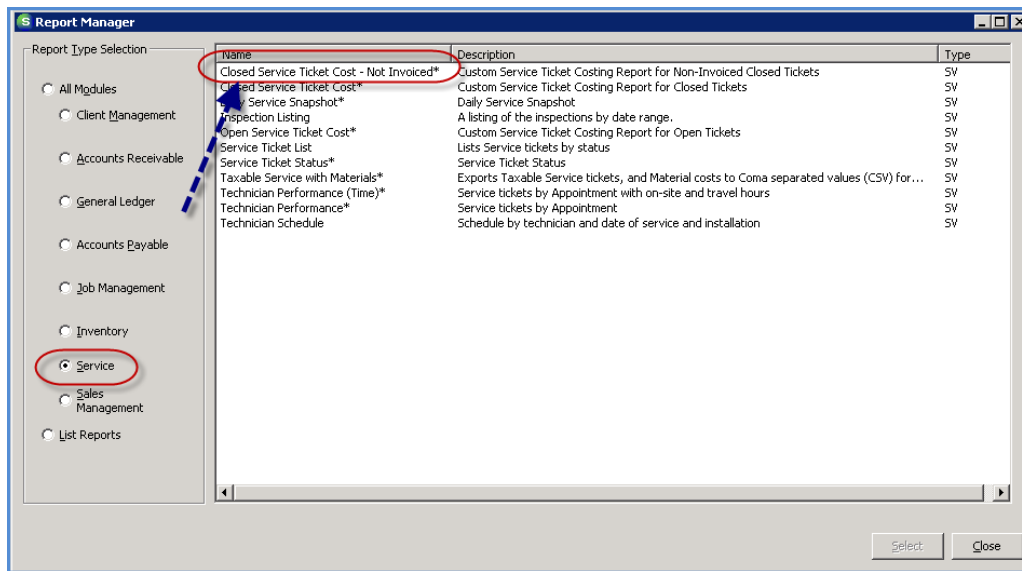
Application Enhancements/Improvements (continued)

Commission Due - Invoiced											SedonaSecurity	
Cut-off Date: 8/28/2013												
Oliver Blais - Oliver Blais												
Job	Customer	Sold	Status	Job Amount	Job Invoiced	% Inv	Commission	CommRMR	Comm Paid	Comm Bal	Comm Due	
143	Jackson, Forrest	8/13/12	Jobcost	12,500.00	12,500.00	100.0%	1,875.00	71.91	0.00	1,946.91	1,946.91	
165	Jordan Williams	12/3/12	Closed	11,532.79	11,532.79	100.0%	225.00	0.00	100.00	125.00	125.00	
174	Davis, Roger	2/14/13	Closed	1,500.00	1,500.00	100.0%	225.00	108.00	0.00	333.00	333.00	
181	Jones, Mary	3/7/13	Jobcost	1,822.25	1,000.00	54.9%	225.00	0.00	0.00	225.00	123.47	
186	Peltzer Construction	4/8/13	Scheduling	11,500.00	0.00	0.0%	1,725.00	0.00	0.00	1,725.00	0.00	
190	Ashley, Victoria	5/15/13	Job Complete	2,541.45	2,541.44	100.0%	381.22	0.00	0.00	381.22	381.22	
201	John Robinsonb	7/2/13	Parts	1,000.00	100.00	10.0%	150.00	0.00	0.00	150.00	15.00	
										4,886.13	2,924.60	

Application Enhancements/Improvements (continued)

Closed Service Ticket Cost – Not Invoiced*

This report is designed to print a listing of Closed Tickets (Service Tickets, Inspection Tickets, Vendor Service Tickets, and Vendor Inspection Tickets) that were closed without being invoiced. This report may be generated in detail or summary mode. The report data may also be exported and saved as a .csv file by clicking on the Export button at the lower right of the report parameter selection form.



Detail Report – Detail Section

Non-Invoiced Closed Service Ticket Report						SedonaSecurity				
8/1/2013 to 8/27/2013										
Ticket Number	Problem Code	Creation Dt	Closed Dt	Res Code	Total Expenses	Hours	Material Expenses	Labor Expenses	Other Expenses	
Customer Number	Site Name	Site Address	Resolution Code	Service Level						
2404	AC Power Failure	10/15/2012	08/27/2013	Sys Restor	0.50	0.02	0.00	0.50	0.00	
41705	Marlon Turner	225 Armory St, Plymouth MI, 48170	Sys Restore	T&M-Res						
2405	AC Power Failure	10/15/2012	08/27/2013	Sys Restor	1.00	0.03	0.00	1.00	0.00	
41701	Ingrid Graves	225 Armory St, Plymouth MI, 48170	Sys Restore	T&M-Res						
2406	AC Power Failure	10/15/2012	08/27/2013	Sys Restor	1.33	0.07	0.00	1.33	0.00	
41707	Johnathan Carson	225 Armory St, Plymouth MI, 48170	Sys Restore	T&M-Res						
2687	Can't Set B/A	07/01/2013	08/27/2013	No Show	7.80	0.43	0.00	7.80	0.00	
30069	Giovanna Jones	14707 Northville Rd, Plymouth MI, 48170	No Show	T&M-Res						
2721	Camera	07/25/2013	08/27/2013	2 Clean	0.00	0.00	0.00	0.00	0.00	
2187	Ernest Peterson Inc.	1830 Broad Street, Detroit MI, 48201	2 Clean	SVC Cont-Com						
2723	Can't Set B/A	08/26/2013	08/27/2013	4 Replace	22.50	1.25	0.00	22.50	0.00	
11478	Edward J. Wilsons Son	1530 East Main Street, Plymouth MI, 48170	4 Replace	T&M-Com						
2725	Add Equipment	08/26/2013	08/27/2013	1 Add	26.25	1.75	0.00	26.25	0.00	
14242	Torrington Hyundai	1446 East Main Street, Plymouth MI, 48170	1 Add	T&M-Com						
Total Tickets:					20	103.18	5.42	0.00	103.18	0.00
Grand Total					Total Tickets: 20	103.18	5.42	0.00	103.18	0.00

Detail Report – Summary Section

Non-Invoiced Closed Service Ticket Report						SedonaSecurity					
8/1/2013 to 8/27/2013											
Resolution Code	Total Expenses	Hours	Material Expenses	Labor Expenses	Other Expenses						
1 Add	Tickets: 1	26.25	1.75	0.00	26.25	0.00					
2 Clean	Tickets: 1	0.00	0.00	0.00	0.00	0.00					
3 Repair	Tickets: 2	35.00	1.50	0.00	35.00	0.00					
4 Replace	Tickets: 1	22.50	1.25	0.00	22.50	0.00					
No Show	Tickets: 1	7.80	0.43	0.00	7.80	0.00					
Sys Restore	Tickets: 14	11.63	0.48	0.00	11.63	0.00					
Grand Total:	Total Tickets: 20	103.18	5.42	0.00	103.18	0.00					

Detail Report – Grand Total and Report Selection Criteria

Non-Invoiced Closed Service Ticket Report						SedonaSecurity					
8/1/2013 to 8/27/2013											
Total Expenses	Hours	Material Expenses	Labor Expenses	Other Expenses							
Grand Total:	Total Tickets: 20	103.18	5.42	0.00	103.18	0.00					
Selection Criteria for Non-Invoiced Closed Service Tickets											
All Active Branches											
All Active Service Companies											
All Service Techs											
Routes: No Routes found.											
All Active Service Levels											

Summary Style Report

Non-Invoiced Closed Service Ticket Report				SedonaSecurity			
8/1/2013 to 8/27/2013							
Total Tickets:		20	103.18	5.42	0.00	103.18	0.00
Resolution Code		Total Expenses	Hours	Material Expenses	Labor Expenses	Other Expenses	
1 Add	Tickets: 1	26.25	1.75	0.00	26.25	0.00	
2 Clean	Tickets: 1	0.00	0.00	0.00	0.00	0.00	
3 Repair	Tickets: 2	35.00	1.50	0.00	35.00	0.00	
4 Replace	Tickets: 1	22.50	1.25	0.00	22.50	0.00	
No Show	Tickets: 1	7.80	0.43	0.00	7.80	0.00	
Sys Restore	Tickets: 14	11.63	0.48	0.00	11.63	0.00	
Grand Total:	Total Tickets:	20	103.18	5.42	0.00	103.18	0.00

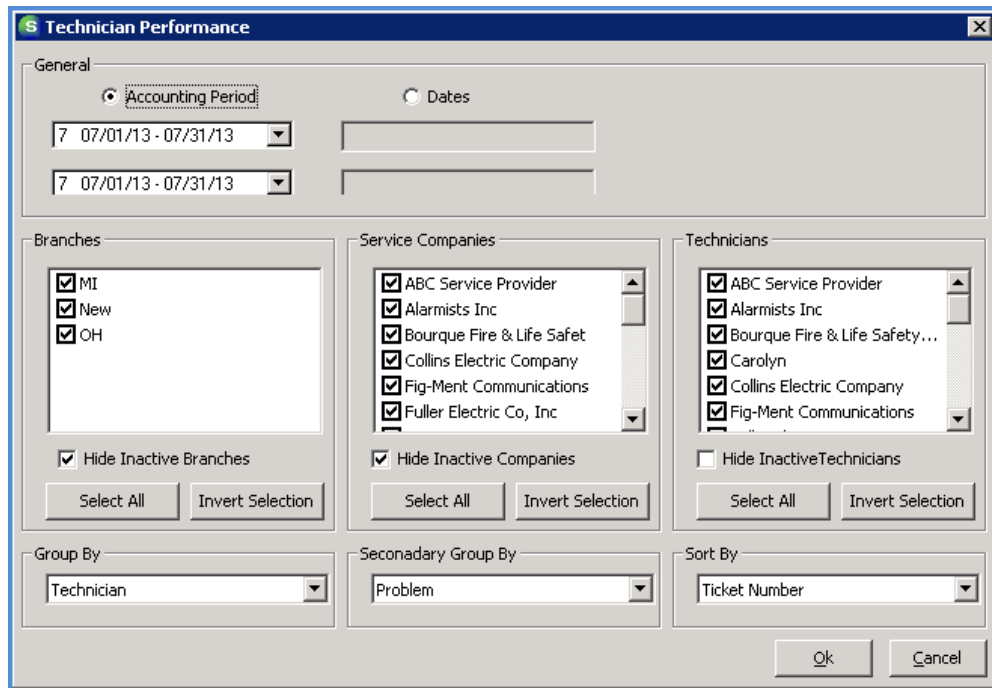
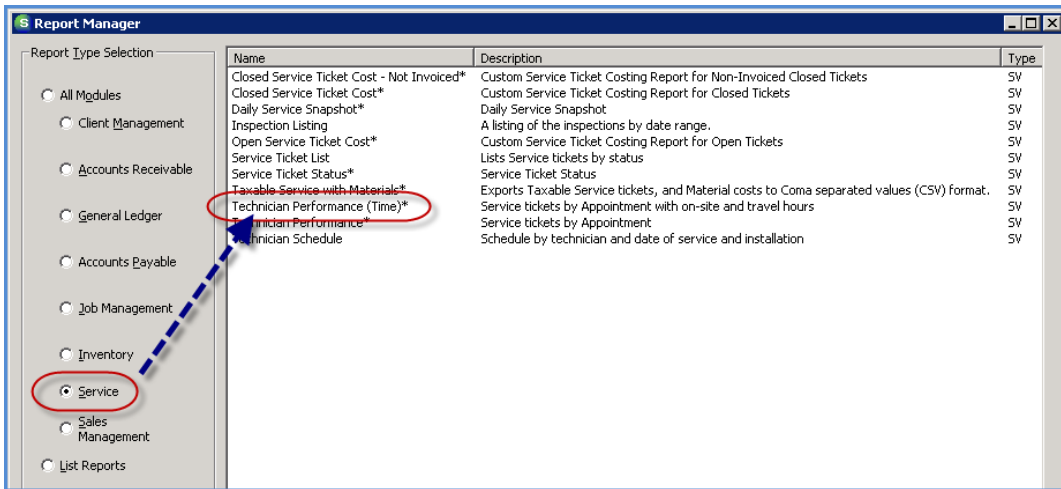
Data from Export to CSV File

	A	B	C	D	E	F	G	H	I	J
	Ticket_	Problem_Code	Creation_Date	Closed_Date	Customer	Customer_Name	Resolution_Code	Service_	Labor_Minutes	Exp
1	Number	Problem_Code	Creation_Date	Closed_Date	Customer	Customer_Name	Resolution_Code	Service_	Labor_Minutes	Exp
2	2358	Can't Set B/A	10/8/2012	8/27/2013	13002	Harvest Hill	3 Repair	T&M-Com	0.50	
3	2360	Can't Set B/A	10/9/2012	8/27/2013	35818	Frank, Jason	3 Repair	T&M-Res	1.00	
4	2388	AC Power Failur	10/15/2012	8/27/2013	43502	Lowe, Clifton	Sys Restore	T&M-Res	0.00	
5	2390	AC Power Failur	10/15/2012	8/27/2013	41267	Drake, Johnny	Sys Restore	T&M-Res	0.00	
6	2392	AC Power Failur	10/15/2012	8/27/2013	41655	Bryant, Emily	Sys Restore	T&M-Res	0.00	
7	2393	AC Power Failur	10/15/2012	8/27/2013	41648	Lyons, Eugene	Sys Restore	T&M-Res	0.00	
8	2394	AC Power Failur	10/15/2012	8/27/2013	41661	James, Joel	Sys Restore	T&M-Res	0.03	
9	2395	AC Power Failur	10/15/2012	8/27/2013	41659	Flynn, Kelsie	Sys Restore	T&M-Res	0.02	
10	2396	Add Equipment	10/15/2012	8/27/2013	41661	James, Joel	Sys Restore	T&M-Res	0.02	
11	2397	AC Power Failur	10/15/2012	8/27/2013	41656	Austin, Giovanna	Sys Restore	T&M-Res	0.03	
12	2398	AC Power Failur	10/15/2012	8/27/2013	41280	Hughes, Camille	Sys Restore	T&M-Res	0.03	
13	2399	AC Power Failur	10/15/2012	8/27/2013	41262	Patterson, Amelia	Sys Restore	T&M-Res	0.03	
14	2400	AC Power Failur	10/15/2012	8/27/2013	41260	Jensen, Karli	Sys Restore	T&M-Res	0.00	
15	2404	AC Power Failur	10/15/2012	8/27/2013	41705	Turner, Marlon	Sys Restore	T&M-Res	0.00	
16	2405	AC Power Failur	10/15/2012	8/27/2013	41701	Graves, Ingrid	Sys Restore	T&M-Res	0.00	
17	2406	AC Power Failur	10/15/2012	8/27/2013	41707	Carson, Johnathan	Sys Restore	T&M-Res	0.00	
			7/11/2013	8/27/2013	30069	James, Joel		T&M-Res	0.43	

Application Enhancements/Improvements (continued)

Technician Performance (Time)*

This report is designed to print a listing of Labor Hours expended by Technicians on Tickets. This report looks at the ticket Dispatch Times to determine what amounts will populate the On-Site Hours and the Travel Hours. The Travel hours are calculated by subtracting the Dispatch Date/Time from the Arrival Date/Time. The On-Site hours are calculated by subtracting the Arrival Date/Time from the Departure Date/Time. The Total Hours column simply adds the On-Site Hours and the Travel Hours.



Technician Performance (Time) Report

Technician Performance		SedonaSecurity			
MI MI-INSP Cont, MI-INSP T&M, MI-NO W/P Parts, MI-SVC Cont, MI-T&M, OH-INSP Cont, OH-INSP R&M, OH-SVC Cont, OH-T&M All Service Techs July 2013					
Ticket	Appointment	On-site Hours	Travel Hours	Total Hours	Site
Madison Morrison					
Add Equipment					
2689	7/10/2013	2.50	0.25	2.75	Annie Hill
Camera					
2721	7/25/2013	0.00	0.00	0.00	Ernest Peterson Inc.
Insp-Access					
2692	7/11/2013	5.92	0.46	6.38	Jane Smith
2694	7/11/2013	<u>3.50</u>	<u>0.75</u>	<u>4.25</u>	Jane Smith
		9.42	1.21	10.63	
Insp-CCTV					
2691	7/11/2013	4.50	0.25	4.75	Jane Smith
Insp-Fire-MO					
2527 *	7/2/2013	0.00	15.75	15.75	Michael Johnson
2527 *	7/3/2013	7.50	0.25	7.75	Michael Johnson
2711 *	7/18/2013	<u>2.50</u>	<u>0.25</u>	<u>2.75</u>	Jordan Williams
		10.00	16.25	26.25	
Insp-Int					
2630	7/2/2013	<u>2.35</u>	<u>0.02</u>	<u>2.37</u>	Ann Foster
		<u>28.77</u>	<u>17.98</u>	<u>46.75</u>	
Mark Taylor					
Add Equipment					
2704	7/16/2013	1.90	0.35	2.25	St. Charlie's Church
2716	7/19/2013	<u>2.00</u>	<u>0.25</u>	<u>2.25</u>	Waldroup, Desire
		3.90	0.60	4.50	

Application Corrections

Client Management

- **\$0.00 Miscellaneous Invoice:** Corrected a reported issue; when clicking Print Preview on a miscellaneous invoice with a net amount invoiced of \$0.00, an error message was displayed.

General Ledger

- **Manual Journal Entry:** Corrected a reported issue; when creating a manual Journal Entry for Job Commissions and multiple Job Numbers were contained in the JE, only the first Job Number was being recognized.

Inventory

- **Return Parts:** Corrected a reported issue; when attempting to return parts to stock for a Job, if the parts were originally issued to the Job via a Direct Expense Purchase Order receipt, then the application was not allowing the return due to the new Phase Code field. This has been corrected.

Job Management

- **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.
- **Job Invoices with Retention:** Corrected a reported issue; when creating the Job invoice, if the quantity or amount of any invoice line item was changed by the User, the retain amount invoice line was locked down and not able to change the retain amount.
- **Issue / Return Parts:** Corrected a reported issue; if a Job Type was not setup to use Job Phases, when trying to issue or return parts on a Job from the Job Issues form, the new field Phase Code, was blank and the User was not able to save the transaction.

SedonaService

- **Service Ticket Purchase Orders:** Corrected a reported issue; after creating and saving a Purchase Order within the Ticket, when opening the PO to view or edit, the part line(s) were not being displayed.
- **Overtime Labor Calculation:** Corrected a reported issue; Labor calculations were not honoring the Overtime Rates if the Technician was dispatched outside of the Service Company's regular business hours.

SageQuest

- User interface performance has been improved when communicating with SageQuest. User interface remains responsive to the user's actions.
- The SageQuest dialog within SedonaSchedule allows the checking and unchecking of drivers.
- The SageQuest Console logs dispatches that were skipped because it doesn't have the proper coordinates.