

# SedonaOffice Release Notice

## SedonaOffice

Version 5.6.200

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SedonaOffice

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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 content contained within, and to be used for reference purposes only.

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



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## **Application Enhancements/Improvements**

#### **Accounts Payable**

#### A/P Bill Import/Export

Two new options have been added to the A/P Bill form to enable you to 1) copy Expense lines to the clipboard [of your computer] and to 2) import data from Excel into the Expense lines of the bill.

The *Import* button is located at the upper right of the form, and the *Copy* button is located at the bottom of the form. For more information on how to use these new features, continue on to the next page.

😫 Bills		-	
Vendor C	ategory	C	☐ Hold Payment
Verizon Wireless	Admin G & A 📃 💌		<u>R</u> ecurring Bill
Vendor Bill		C	
Vendor Verizon Wireless	R <u>e</u> ference # B	Branch	
Address: P.O. BOX 15062		MI	Import from Excel
Albany, NY 12212	Terms 🖉	<u>A</u> mount	Import nom Excer
	Net 10		
	Bill Date P	ayment Due	
	12/5/2013	12/5/2013	
	Eligible for Discount Amt	Costing	
		帶	
Parts Expenses Documents	V Show Brand	ches 📋 Show Job Cost	
	General Ledg	ger	
GL Account	ion Amoun	it Branch C	ategory
*			
	I	1	·
Memo	Copy Expe	inse Lines to	Total 0.00
	Line Cil	ipuoard	Balance Due
			, 0.00
		Conu Exponence	Analy Sava Class



To use the *Import* from Excel option, first open the Excel file which contains the Expense Lines to be imported into the SedonaOffice A/P Bill. The columns must be formatted in the order of the SedonaOffice Bill form. Within the Excel worksheet, highlight the Expense Lines to be imported, and copy to the clipboard by either clicking on the Copy button on the Excel Ribbon or right-click after highlighting the Expense Lines and selecting the Copy option.

	🚽 4) • (2 • 1 =	And the second second second	-		-		_	Ve	erizon Bill Dec 2013	- Micros	oft Exc
F	ile Home	Insert Page Layout Formulas	Data	F	Review	View	Add-Ins				
Calibri • 11 • A				=	- 8		🖥 Wrap Text	•	General	-	4
Pa	ste 🍼 Format Pair	nter 🖪 I 🗓 - 🏹 -	A - 🔳	≣		>	📲 Merge & O	enter 🔻	\$ ~ % <b>,</b>	) .00 ( )0 F	.onditi ormatt
	Clipboard	G Font	G.		A	lignme	nt	G.	Number	- 6	onnace
	A2										
	А	В	С		D		E	F	G	Н	
			_						_		
1	GL Account	Description	Amoun		Branch	<u>c</u>	ategory		Expense Type		
2	620750	Cell Phone - Matt Miller	203.5	5 M	I	Sales			0		
3	620750	Cell Phone - Maggie	48.	.5 M	I	Admi	n G & A		0		
4	620750	Cell Phone - Millie Mitchell	48.	.5 M	I.	Admi	n G & A		0		
5	620750	Cell Phone - Mark	112.	.6 M	I	Servio	ce G & A		0		
6	620750	Cell Phone - Marshall	112	X	Cut			7	0		
7	620750	Cell Phone - Marlin	122		Сору				0		
8	620750	Cell Phone - Mack		1	Paste O	otions:			0		
9	620750	Cell Phone - Madison	112		(Å)				0		
10	620750	Cell Phone - Mason	112						0		
11	620750	Cell Phone - Mike Mckerzle	112		Paste <u>S</u> p	ecial			0		
12	620750	Cell Phone - Mike Wälker	112		Insert				0		
13	620750	Cell Phone - Oliver Blais	203.		Delete				0		
14	620750	Cell Phone - Oliver Janas	48		Clear Co	ntents		-	0		
15	620750	Cell Phone - Orlando	112		Filter		•		0		$\rightarrow$
17	620750	Cell Phone - Oscar	112		Sort		•		0		
18	620750	Cell Phone - Osman	112		Incart C		•		0		
19	620750	Cell Phone - Rebecca	48		Insen C	o <u>m</u> men			0		
20				1	<u>F</u> ormat	Cells					
21					Pic <u>k</u> Fro	m Drop	-down List				
22					Define I	l <u>a</u> me					
23				2	Hyperlin	ik					
24											
25											
26											



Now navigate to SedonaOffice and create a new A/P Bill for the Vendor. Click on the Expense tab in the body of the Bill form, and then click on the Excel button at the top of the Bill form. The Expense lines will fill in from the data copied from the excel worksheet.

S Bills	5 f	Category	2 A 💌				)			_ □ ×
Verizo Ver Vend Addri	n Wireless ndor Bill for Verizon Wireless ess: P.O. BOX 15062 Albany, NY 12212	Decument	Reference # Dec 2013 Ierms Net 10 Bill Date 12/5/2013 Eligible for Disco 1952.30	B P Int Amt Show Branc	ranch MI   1952.30 ayment Due 12/5/2013   osting   thes   Show J	T D D D D D D D Cost		)		
		1			Genera	Ledaer				
	GL Account	Descripti	ion			Amount I	Branch	Category		
►	620750	Cell Phor	ne - Matt Miller			203.55	мі	Sales		
	620750	Cell Phor	ne - Maggie			48.50	MI 🕨	Admin G & A		
	620750	Cell Phor	ne - Millie Mitchell			48.50	MI	Admin G & A		
	620750	Cell Phor	ne - Mark			112.60	MI	Service G & A		
	620750	Cell Phor	ne - Marshall			112.60	MI	Service G & A		-
Memo	0				×			Copy Expenses	Total Balance Due	<u>1952.30</u> 1952.30 <u>S</u> ave <u>C</u> lose



To use the *Export* option, which copies the A/P Bill Expense lines to your clipboard, first open a saved A/P Bill [or a Bill that you are creating that is complete but not yet saved] which contains at least one Expense line. Click on the *Copy Expenses* Button located at the bottom of the form. This will copy all information in the Expense Line columns to the clipboard of your computer. You may then use the Paste function in Excel to bring in the contents that were copied to the clipboard from the A/P Bill Expense lines.

S Bills Vendor United	Parcel Service	Category Admin G & A	I		[ <b>王</b> ]			Lold Payment
Ven Vende Addre	dor Bill or United Parcel Servi P.0. BOX 7247-0244 Philadelphia, PA 19 rts 0.00 Expense 517.	ce R4 1170 I e 1170 J 1 1 50 Documents	gference # tov 2013 erms Vet 10 yet 10 pate 2/2/2013 gible for Discount Amt 17.50 Show Bra	Branch MI  Amount S17.50 Payment Due I2/5/2013 Costing Costing Cost R  Payment V	] ] g			
			General Ledger				Job Cost	
	GL Account	Description	Amount	Branch	Category	Job	Type Pa	ss Item
•	580113	COS - Freight on Parts	32.95	MI	Jobs Res	191	F	
	580113	COS - Freight on Parts	102.50	MI	Jobs Com	201	F	
	580113	COS - Freight on Parts	22.45	MI	Jobs Res	305	F	
	580113	COS - Freight on Parts	359.60	MI	Jobs Com	316	F	
*								-
Memo				X		Copy Expense	Total Balance Due	517.50 517.50 Save <u>C</u> lose

#### Expense Lines Pasted into Excel

	<b>₽ 9 • (</b> * •   <del>-</del>	_	-	_	-		Verizon Bill Dec 20	013 - M
F	File Home Insert Page Layout Formulas Data Review View Add-Ins							
ľ	Calibri v 11 v A A ≡ ≡ w Wrap Text General General							
Pa	Paste v Format Painter B I U v □ · △ · ▲ · ■ ≡ ≡ □ □ □ · △ · S · · · · · · · · · · · · · · · ·							
	Clipboard 🖓	Font	Gi .		Alignment		G Number	ſ
	E25 •	f <sub>x</sub>						
	А	В	С	D	E	F	G	Н
1	G/L Account	Description	Amount	Branch	Category	Job#	Job Expense Type	
2	580113	COS - Freight on Parts	32.95	MI	Jobs Res	191	F	
3	580113	COS - Freight on Parts	102.5	MI	Jobs Com	201	F	
4	580113	COS - Freight on Parts	22.45	MI	Jobs Res	305	F	
5	580113	COS - Freight on Parts	359.6	MI	Jobs Com	316	F	
6								
7								
8								
-								



#### **Accounts Receivable**

#### **EFT Transactions in a Sandbox Company**

A change has been made to the software which will not allow a User to process EFT transactions if the word Sandbox is a part of the company name. When clicking on the EFT Processing option from the Accounts Receivable menu, the User will be presented with the message shown below.



#### **Client Management**

#### **Recurring Escalations**

A new enhancement, *Recurring Escalations*, has been added to the application. The Recurring Escalations feature enables you to create a Rate Increase Schedule linked to a recurring line that works in conjunction with the Company Rate Change program.

Recurring Escalation Rate Schedules are first created in a new setup table in SedonaSetup labeled *RMR Escalations*. For each RMR Escalation Code, you setup a default Rate Increase Scheduled. Each default schedule contains one or more lines that indicate the renewal number, the percentage to be used for the rate increase, and a description. You may create as many RMR Escalation codes as needed.

The RMR Escalation feature is basically used to set up a schedule that includes future rate increase dates and increase percentages on an individual recurring line that will be used by the Company Rate Change program to determine when and what rate to increase a recurring line.

When using the Company Rate Change program with the Recurring Renewal Dates method (only), if a recurring line is setup with an Escalation Schedule, the program will determine which rate to use based upon the escalation schedule of the recurring line.

A new tab has been added to the Recurring Line labeled *Escalations* to setup and manage the RMR Escalation schedule.

A new User Group Security option, *Access to RMR Escalations*, has been added to the CM application access tab which allows you to control which User Groups may have access to setup/manage Escalations on Recurring lines.



#### SedonaSetup/RMR Escalations

To be able to use the Recurring Escalations feature, you must first create at least one Escalation record in the new RMR Escalations setup table found in SedonaSetup.

Click on the *New* button, enter the *Code* and *Description* for the RMR Escalation Code, then in the lower section enter the *Renewal Number, Increase Percentage* and the *Description* for the Renewal Number.

Sedona Office Setup (Sedona Security)					
File Find Find Next View Tools	Help				
Sedona Setup					
Provide in a	L Anna I		RMR Escalations		
Description	Area		RMR Escalation List -		
Invoice items	AR				
Item Types	AR		Escalation Code	Excelation Description	tive
Catua Pression	AR		3-Year Cont	3-Year Contract	5
Statement Bulas	AR		5-Year Cont	5-Year Contract	
Statement Rules	AR				
Tax Groups	AR				
Tax Tables	AR				
Cancellation Brofiles	AK CM				
Cancellation Fromes	CM				
Cancellation Tasks	CM	Ξ			
Collection Statuces	CM				
Custom Fields Satur(Customer)	CM				
Custom Fields Setup(Customer)	CM				
Custom Fields Setup(Site)	CM				
Custom Fields Table1 (Customer)	CM				Inactive
Custom Fields Table1 (Customer)	CM		Escalation Code	3-Year Cont	
Custom Fields Table1 (System)	CM		Description		
Custom Fields Table? (Customer)	CM		Description	3-Year Contract	
Custom Fields Table2 (Site)	CM				
Custom Fields Table2 (System)	CM			Ingrance Data Description	
Custom Fields Table3 (Customer)	CM		Reriewai #	2 Pate Increase # 1	
Custom Fields Table3 (Site)	CM			3 Rate Increase # 2	
Custom Fields Table3 (System)	CM		3	3 Rate Increase # 3	
Customer Groups	CM		4	4 Rate Increase # 4	
Data Entry Defaults	CM		5	4 Rate Increase # 5	
Payment Methods	CM		6	4 Rate Increase # 6	
RMR Escalations	CM		7	5 Rate Increase # 7	
RMR Reasons	CM		8	5 Rate Increase # 8	
System Types	CM		9	5 Rate Increase # 9	
Type Of Customer	СМ		10	5 Rate Increase # 10	
Alarm Services	CS		11	0 Rate Increase # 11	<b>v</b>
Authorities	CS				
Signal Types	CS		Re-Sequence in s	hown order	Annha Mana Data
Transmission Format	CS				Appiy New Delete
UL Grade	CS	-			
		4			



## SedonaSetup/User Group Security/Access to RMR Escalations

To be able to attach an Escalation Schedule to a Recurring line, the User Group must be granted the new permission, Access to RMR Escalations, found in the CM permissions group.

C <u>o</u> de Administrator	Description Administrator		Leve 3	•	Credit Memo Limit \$50,000.00
Application Access Rep	ort Access				
Access		Module			*
Site Documents		CM			
Site Items		CM			
Site Transfer		CM			
System Custom Fields		CM			
System Documents		CM			
Client Management Repo	rts	CM			
Central Station Tracking [	Data	CM			
Access to Complete Canc	ellations 🛛 🔪 🥔	CM			
Access to Add/Edit Inspe	ctions	CM			
Access to RMR Escalation	is 👘	СМ			
Accounts Receivable		AR			
Credit Request		AR			
Credit Memo		AR			-
Print			<u>A</u> pply	1	<u>V</u> ew <u>D</u> elete



#### Attaching an RMR Escalation Schedule to a Recurring Line

Open the Recurring Line in edit mode; navigate to the new *Escalations* tab. From the dropdown list, select the desired RMR Escalation Code. The lower section of the form will automatically fill with the Escalation Schedule. The beginning date of the Escalation schedule is determined by the current Rate Increase date of the recurring line. The current recurring line rate increase date plus one year is used as the starting point of the schedule.

If desired, you may manually change the Rate Increase Date, Increase Percentage and Description for any or all of the defaulted Escalation Schedule lines. When finished, click on the *Save* button of the Escalations form and then again on the Recurring Line form.

Note: You must have a date entered into the recurring line Rate Increase date field to be able to attach an RMR Escalation schedule.

S Recurring	g Edit 168	29 Santas	Ranch Road				X
Sustem	d System Martin, Sam 129 Barton Rar Pacific Grove, C	nch Road CA 93950		M. 12 Pa	artin, Sam 29 Barton Ranch Road acific Grove, CA 9395(	D	_
Panel Ty	Intrusion /pe						
Recurring	Setup   Royalties /	Commissions	Escalations 3-Year Cont	_	J		
Renewa 1 2 3 4 5 6 7 8 9 9 < ◀	al # Increase Da 11/1/2014 11/1/2015 11/1/2016 11/1/2017 11/1/2018 11/1/2019 11/1/2020 11/1/2021 11/1/2022	ate	Increase Pctg 3.0000 3.0000 4.0000 4.0000 4.0000 5.0000 5.0000 5.0000 111	Description Rate Increase Rate Increase Rate Increase Rate Increase Rate Increase Rate Increase Rate Increase Rate Increase Rate Increase	e # 1 e # 2 e # 3 e # 4 e # 5 e # 6 e # 7 e # 8 e # 9	Posted	
Re Ra Inc De	enewal Number ate Increase Date crease Percentage escription	1 11/1/2014 3.0000 Rate Increase	e # 1			Save	Delete
						Save	<u>C</u> lose



#### **Company Rate Change with RMR Escalations**

When viewing the list of Customers on a Rate Change Batch (using the Recurring Renewal Date method), any customer in the list that is linked to an RMR Escalation Schedule, will display the customer number in a blue font.

S Company Rate Change								
De	escriptio <u>n</u> Setup Informat	<ul> <li>Stand</li> <li>Mastr</li> <li>Both</li> <li>te Change</li> </ul>	dard Customers er Accounts					
	Customer #	Site Name	Item	Current	Incre	New		
1	201	Martin Flowers #1	MON	68.00	1.36	60.36		
(	45752	Trene Pone	MON	4 75	0.10	4.85		
	5789	Flizabeth Wyman	0016	12.00	0.10	12 59		
	5789	Elizabeth Wyman	MON	29.00	1.42	30.42		
	5789	Elizabeth Wyman	INSP Fire System	22.00	1.08	23.08		
	Total Increase : \$4.55							
Γ	Save As New	Save As New Setup						



#### **Default BillTo Address for Invoice Type**

New checkboxes have been added to the customer BillTo record which allows you to select which type or types of invoices will use a specific BillTo record as the default. You may create a separate BillTo for each invoice type or use a single BillTo record for all or selected invoice types. If the customer has only one BillTo record and any invoice types are left un-checked, that primary BillTo will be used for all invoice types for the customer.

S Customer Bil	ling 201		<b>—</b> ×
Customer Informa	ation		
🥡 Customer #	201		
Customer Na	ame Martin Flowers		
Billing Inform	mation Torontacts		
	Residential C Commer	cial (•	Inactive Primary Mail
<u>N</u> ame	Martin Industries		_
<u>A</u> dditional Name	Loss Prevention		
<u>A</u> ddress	PO Box 2541 Plymouth, MI 48170		
Phone <u>1</u> Phone <u>2</u> Eax Email		Primary RMF     Primary Ser     Primary Job     Primary Oth	R vice er
	Email Invoices	Email Invoices Availabl PDF Explode Only	e through
	Copy Billing Address to Site		
		Save	Close



#### **Customer Search**

A new checkbox, labeled *All Branches*, has been added to the Customer Lookup form. If you need to search in one or multiple Branches, un-check the All Branches checkbox, then highlight the Branches to be includes in the search.

S Customer Lookup		
📸 Search Criteria ———		
C Customer Number	O System Account	All
C Na <u>m</u> e	O Job Number	3rd Party Billing Dealers BOD
○ <u>A</u> ddress	O Service Ticket	CA MI
C Telephone		ОН
C Bill Contact	C Credit #	
C Site Contact	C Check Number	
☑ System Level Search	Copen Invoice	Enter Search Text



#### **General Ledger**

#### Journal Entry Export

A new option has been added to the Journal Entry form which allows you to export the lines which make up a Journal Entry to Excel. The Export feature may be used when creating a new Journal Entry or opening a posted Journal Entry.

To use this feature, while viewing a Journal Entry, click on the new **Export to Excel** button located at the upper right of the form. You may now copy the Journal Entry data into an Excel worksheet.

S Journal Entry						_	- • •
Select Journ Template Journal Informati Date Primary Acccount Reference	al   MI 11/30/2013 511100  COS - JobS-Labor Job Costino Labor Clear	_ <u>₩</u>     	Si Save as It Description	emplate	ew Template		
	Show Job Costing	Show Branches	Reversal E	ntry Date	<u> </u>		
			General Ledger				
Account 🛄	Description	Debit	Credit	Memo	Branch	Category	
511100	COS - Jobs-Labor		150.00	Clear out Job Costing Lab	MI	J-LCom	
258100	Deferred Labor - Jobs	150.00		Clear out Job Costing Lat	MI	J-LCom	
*							Ţ
Te T	Show Inactive GL Accounts	\$	150.00 ntries			<u>o</u> k	Cancel





#### Inventory

#### **Physical Inventory Count Sheets**

A change has been made to the printed inventory count sheet report; the Warehouse Code will now print in the header of the report.

Count Sheet Page# 1											
8:02 AM		2013-11-27 M100	M100								
Part Cod e	Description	Detail	Product Line	Row	Shelf	Bin	<u>0/H Qt</u>				
ULT1240	ULTRA TECH 12V 4AH BATTERY	ULTRA TECH 12V 4AH BATTERY	Batteries	С							
ULT1270	ULTRA TECH 12V 7AH BATTERY	ULTRA TECH 12V 7AH BATTERY	Batteries	С							
YOUNP46	YUASA NP4 6VOLT BATTERY	YUASA NP4 6VOLT BATTERY	Batteries	С							
69	# 69 DOOR CORD	# 69 DOOR CORD	Contacts	С							
EVDW4975	EVDW4975 VANISHING CONTACT	EVDW4975 VANISHING CONTACT	Contacts	С							
GRI4532	GRI OVERHEAD DOOR SWITCH	GRI OVERHEAD DOOR SWITCH	Contacts	С							
DSCRFK5501	DSC RFK5501 KEYPAD W/RECEIVER	DSC RFK5501 KEYPAD W/RECEIVER	DSC Security Equipment	С							
DSCWS4945	WIRELESS DOOR/WINDOW CONTACT	WIRELESS DOOR/WINDOW CONTACT	DSC Security Equipment	С							
FILSBIO	PULL STATION BACK-BOX	PULL STATION BACK-BOX	Enclosures/Boxes	С							
5808W3	ADEMCO WIRELESS SMOKE	ADEMCO WIRELESS SMOKE	Fire Equip/Smoke/Heat	С							
FILBG12	PULL STATION	PULL STATION	Fire Equip/Smoke/Heat	С							
5853	ADEMCO WIRELESS GLASSBREAK	ADEMCO WIRELESS GLASSBREAK	Glass Break Detectors				-				



#### **Direct Expensed Service Parts**

A change has been made to the Parts Journal to display entries for parts that were direct expensed to Service or Inspection Tickets.





#### Part Query Builder

Several new fields have been added to the Part Query Builder; these fields are listed below.

S Parts Query Builder			
<ul> <li>Parts</li> <li>Inventory</li> <li>Journal</li> <li>Repairs</li> <li>Physical</li> <li>Liserdef</li> <li>Supplier_Code</li> <li>Supplier_Name</li> <li>Supplier_Part_Number</li> <li>Supplier_Part_Desc</li> <li>Supplier_Part_Cost</li> <li>Supplier_Part_List</li> </ul>	Fields to Dis Part_Code SVC_Customer_Number SVC_Customer_Name Job_Code Job_Customer_Name Journal_Reference Journal_GL_Memo SVC_Warehouse SVC_Warehouse SVC_Tech_Name	Relation       Criteria       And/Or       3roug         Inct rows       Image: Criteria Rows:       1000	Order By A/D
\$	0 Rows Returned	UL Clear Open Save Export	Preview Close

### Job Management

#### Job Invoicing BillTo

A change has been made to the application which now allows the User to change the BillTo when invoicing a Job through the Job Billing Queue. Previously, you could only change the BillTo after the Job Invoice was posted.

S Job Invoice	1. 10 mm - 3.	distance in	-	-	×
Customer Number Category 165 Pres/SCom Job Invoice Johnson, Sammy 1000 Main Street Fresno, CA 93720 Johnson, Sammy		AR Account 110110 Bill RMR RMR Reason New RMR Activation Date 11/25/2013 Next Cycle Date		Aging Date Invoice Date Invoice # P.O. Number	oup ayne County 11/25/2013 11/25/2013 119976
Address: Fre Bill To		01-Oct-13	<b>▼</b>	-	×
Items \$1,500. Item Item MON *	Address 1 1000 Main Street PO Box 1233	City Fresno Fresno	State CA CA	2 Zip Code 93720 93720	Is Primary Y N
Description In: Contact Memo	~			S	ave Close
Add to Print Queue					Save Close



#### Job Part Kits

If a part was entered on the Job Materials List that is setup as a "Kit" in the part setup, once the Job is closed, the parts that are contained in the kit will be listed separately on the System Equipment List of the Customer Explorer.



#### Job Negative Recurring

The ability to create a negative recurring line on a Job has returned to the application. Negative RMR is typically used to indicate discounts which you would like your customer to see on their Cycle Invoices.

🜀 Job - 301 (Les	ley Martin)							
Job	Job		Customer 9639	Site				
X Sales Summary	Job Number 301 Job Type Intru Job Status Sche System A104 Labor Units 2.75	sion-Res duling 23 Intrusion (0 Used)	Martin, Lesley 5 Cliffmount Drive Plymouth, MI 48170 (734) 286-8446	Lesley Mar 5 Cliffmour Plymouth, (734) 286-	tin It Drive MI 48170 8446			
Work Order	Recurrings							
	Item Code Descrip MON Monito MON Monito	otion ring ring Discount	Sub Item Of	Bill Cycle Cycle Start Annual Annual	RMR Amount 23.00 -1.92	Cycle Amt 276.00 -23.00	Tax         Master         Active           1.55         N         Y           -0.13         N         Y	
Tasks Installs \$299.00								
Recurring \$21.08				, i			Total Monthly Amount 2	1.08 1.42
\$	Recurring Item Description	MON Monitoring Discount	RMR Amount	-1.92	_			
\$0,00	Sub Item Of Bill Cycle	Annual	Cycle Amount	-23.00	Enter as Monthly Amt Only			
Cost Details Journals	Cycle Start		<b>1</b>	<u>S</u> ave <u>N</u> e	w Delete			
Tools Quotes								Apply



#### Job Purchase Orders – Parts Purchased in Bulk Quantities

A change was made to the application in regards to creating Purchase Orders within the Job. If a part listed on the Job Materials List that needs to be purchased is setup with a package quantity greater than 1 in the Part Setup, when creating the Purchase Order within the Job record, the quantity which will default into the PO will round up to the nearest number of packages to fulfill the Job part requirement.

For example, your company purchases a part in a 10-pack. The Job requires 12 pieces of this part. When creating the PO within the Job, the quantity will default to (2) 10-packs. If the PO is marked as and received as a Direct Expense, or if the Receive & Issue Immediately option is selected when receiving the PO, the cost of both 10-packs received will be applied to the material cost of the Job. Excess parts ordered and received to the Job would need to be returned to stock if not needed for the Job.

#### Multiple package quantities for the same Part

The Part setup allows you to setup the same Vendor for the same part with different package quantities. When creating a PO for parts within a Job record, the largest package quantity will always be used as the default. If the Job required 1 of the part shown below, and the PO is created within the Job, the default order quantity will be 1 package of 10.

Part Edit						×
Part 1025-WP					ſ	Inactive
ني P <u>a</u> rt Detail	🛒 Vendors 🛛 🧝	Alt. Parts 📔 🚍	Warehouses 📔 📃 🤇	Custom Fields	Documents (	0)
Vendor	Vendor Part	Purchase Cost	Descripton		uantity Prima	y List Pric
ADI	1025-10PK	2.5000	Wall Plate White	- 10 Pack	10 Y	1.500
•						
Vendor	ADI		•	Purchase Cost	2.5000	
Vendor Part	1025-10PK			List Price	1.5000	
Description	Wall Plate White -	10 Pack		Quantity	10	
	Primary Vendor	N				
						4

#### **Sales Management**

#### Prospects

Two new fields have been added to the Prospect data entry form, *Master Account* and *Retain Data after Apply*. These new fields will be described below and on the following page. Further, the *Inactive* checkbox on the Prospect form has been moved to the bottom of the form (previously located at the upper right of the form).

The *Master Account* field is a drop-down list which allows you to link the Prospect record to an existing Master Account. If your company is using Opportunities within Sales Management, when the Opportunity is Resolved and converted into a Customer, the Prospect will be setup as a Subaccount and attached to the Master Account selected on the Prospect form.

Prospect	Entry		
C <u>o</u> mpany <u>N</u> ame <u>T</u> itle	C Residential C Commercial Plymouth Spring Company Mark Larsen	Master Account Temperature Phone <u>1</u>	10472 HOT (734) 358-4736
<u>A</u> ddress Status Pri. So <u>u</u> rce Sec. So <u>u</u> rce	36588 Commercial Drive Plymouth, MI 48170 New Self-Generated Re-Flag	Phone <u>2</u> <u>M</u> obile <u>P</u> ager Fa <u>x</u> E <u>m</u> ail Sales Department Salesperson 2nd Salesperson	marklarsen@plymouthspring.com Sales ▼ George.Miller ▼
Resolution Comments:		Next Follow Up Resolution Date	ata after Apply



The new checkbox field, *Retain Data after Apply*, was designed to remember the values selected for Prospect Status, Primary Lead Source, Sales Department and Salesperson when creating the next Prospect record. If you do not want the form to remember the previous selections, then do not check this box.

Prospect	Entry		
	C <u>R</u> esidential ⓒ Commercial		
C <u>o</u> mpany	Plymouth Spring Company	Master Account	10472 💌
<u>N</u> ame	Mark Larsen	<u>T</u> emperature	HOT
<u>T</u> itle	Security Manager	Phone <u>1</u>	(734) 358-4736
Address	36588 Commercial Drive	Phone 2	
Address	Plymouth, MI 48170	Mobile	
		<u>P</u> ager	
Status	New	Fa <u>x</u>	
Pri. Source	Self-Cenerated	E <u>m</u> ail	marklarsen@plymouthspring.com
Sec. Source		Sales Department	Sales
		Salesperson	George.Miller
		2 <u>n</u> d Salesperson	<b>•</b>
		N <u>e</u> xt Follow Up	
Resolution		Resolution Date	
Comments:			A
			-
		-	
	Import Inactive	Retain D	ata after ApplyApply



#### SedonaService

#### SedonaSchedule

With the release of SedonaOffice 5.6.19?, SedonaService is being re-named SedonaSchedule and will now provide the ability to schedule and dispatch Job Appointments. Detailed information on how to use the options for scheduling and managing Job Appointments is available in a separate Reference Document.



#### **Ticket Queue**

Two new columns have been added to the field chooser of the Ticket Queue: *Resolution Code* and *Customer Comments*.

() + + +	Service Ticket Queue Opti		_		-	
View Service Options	Queue					
Open Appointment No Appointment I	Go Resolved Unresolved Back View	Closed	Queue View Servi	ce Ticket ge		
Calendar		Drag a col	umn header here t	o group by th	at column	
November 2013 December 20     S M T W T E S S M T W T	13 <b>)</b>	Ticke V	Created On V	PR	⊽ ST	
12 12 Tield		2348	07/17/2013	Low	CL	
3 4 5 6 7 8 9 8 9 1		2329	07/08/2013	Medium	CL	
10 11 12 13 14 15 16 15 16 1 17 18 19 20 21 22 23 22 23 22	Cust Comments	2327	07/08/2013	Medium	CL	
24 25 2627 28 29 30 29 30 3	Customer Name	2326	07/08/2013	Medium	CL	7/8/2
	Customer Number	2279	05/28/2013	Medium	CL	5/28
	Date 1	2271	04/08/2013	Medium	CL	
0		2268	03/22/2013	Medium	CL	
Site	Map Code	2266	03/22/2013	Medium	CL	
	Money Label 2	2262	03/20/2013	Medium	CL	
		2259	03/11/2013	Medium	CL	
System	PR	2255	03/11/2013	Medium	CL	<b>2/2</b> 5
Contact	Problem	2251	02/24/2013	Medium	CL	<b>2/2</b> 5
		2244	02/23/2013	Medium	CL	
Problem	Resolution Code	2243	02/23/2013	Medium	CL	
Technician		2242	02/23/2013	Medium	CL	
		2241	02/23/2013	Medium	CL	
Scheduled						



#### **Ticket Parts Reconciliation**

Tickets have been enhanced to now reconcile the Parts used on a ticket prior to being able to invoice a ticket. If the ticket is non-billable, the parts reconciliation check is performed when attempting to close the ticket.

If a part was entered on a Ticket and the Issue from Stock checkbox was un-checked, and a Purchase order was not created (and received) for the part, the application will stop the User from invoicing or closing the ticket until a correction has been made. The User would need to either check the Issue from Stock checkbox or remove the part from the ticket.



#### **Ticket Journal**

A new option has been added to list of the Ticket Journal labeled **Parts Reconcile.** When selecting the Parts Reconcile option, you may view parts that have been added to the Equipment and Parts form. Parts that have not yet been issued to the ticket will display in a red font in the balance column.

Ticket       Cound       Service       Custom       Appointments       Billing       Documents       Equipment       Date       Other       Purchase       Service       Ticket			-	Journal			off factors	- 8.2		Ticket #2355		. * 1	÷	-	0	×
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## **Application Corrections**

#### **Accounts Payable**

- **Purchase Order Warehouse**: Corrected a reported issue; while in the Warehouse field of the Purchase Order header and typing the first letter of the Warehouse then pressing tab would select the desired Warehouse but not refresh the Branch field which is associated with the Warehouse.
- **Purchase Order G/L Expense Type**: Corrected a reported issue; when selecting a previously used G/L Account [for the Vendor on the PO] as an Expense Item on a Purchase Order, the previously saved Job Expense Type will default into the expense line. When clicking on the G/L Account lookup button on the Expense line and selecting a previously used G/L Account for the Vendor, the Job Expense Type was defaulting to 'O'.

#### **Accounts Receivable**

• Additional Name field on BillTo Printing on Invoices: Corrected a reported issue; when an Invoice is linked to a non-primary BillTo and that BillTo record contained information in the Additional Name field, the Additional Name information was not printing on the Invoice.

#### **Client Management**

- **Cancellation Queue**: Corrected a reported issue; Clicking on the "Completed Only" checkbox presented an error message.
- **Remove RMR Cancellation on a Subaccount**: Corrected a reported issue; If a Recurring Line was flagged to Bill To the Master Account, when using the option to Remove the RMR Cancellation, the Bill To Master checkbox was being un-checked on the active recurring line.
- **Multiple BillTo Records**: Corrected a reported issue; When clicking on the Bill To option on the Customer Tree within the Customer Explorer, all BillTo names displayed in the Active Pane showed the same Name as the Primary BillTo record.

#### Application Corrections (continued)

#### Inventory

- **Parts on Miscellaneous Invoice**: Corrected a reported issue; In SedonaSetup, if the Inventory option "Do Not Allow Negatives" is implemented, a User was able to enter a quantity of a part that was not available in the Warehouse selected on the Invoice.
- **Inventory Count Sheet Printing**: Corrected a reported issue; When all Warehouses are locked down at the same time for Physical Inventory, when printing the Count Sheets, the Warehouse Code was not printing on the count sheet.

#### Job Management

• Job Invoicing Install Charges: Corrected a reported issue; Invoice amount was rounding differently on the invoice as opposed to the posting to the general ledger.

#### Sales Management

• **Opportunity Address**: Corrected a reported issue; When a Prospect was created for an existing customer, the Site Address on the Opportunity record was being populated with the customer billing address.

#### SedonaService

• **Ticket Dispatch Time**: Corrected a reported issue; Unable to enter a time of prior to 7:00am in the Ticket Dispatch form. To enter a time prior to 7:00 am, the User must enter a leading zero i.e.: 06.00 for 6:00 am.

#### SedonaSetup

- User Group Permissions: Corrected a reported issue; User Groups that did not have the permission to *Credit Off Invoices* or *Make a Deposit* we not stopped from performing these transactions.
- **Routes Setup Table**: Corrected a reported issue; When clicking on the checkbox to include inactive, an error message was being presented to the User.