



# SedonaOffice Release Notice

SedonaOffice

Version 5.6.200

Last Updated: 05-Dec-2013

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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.

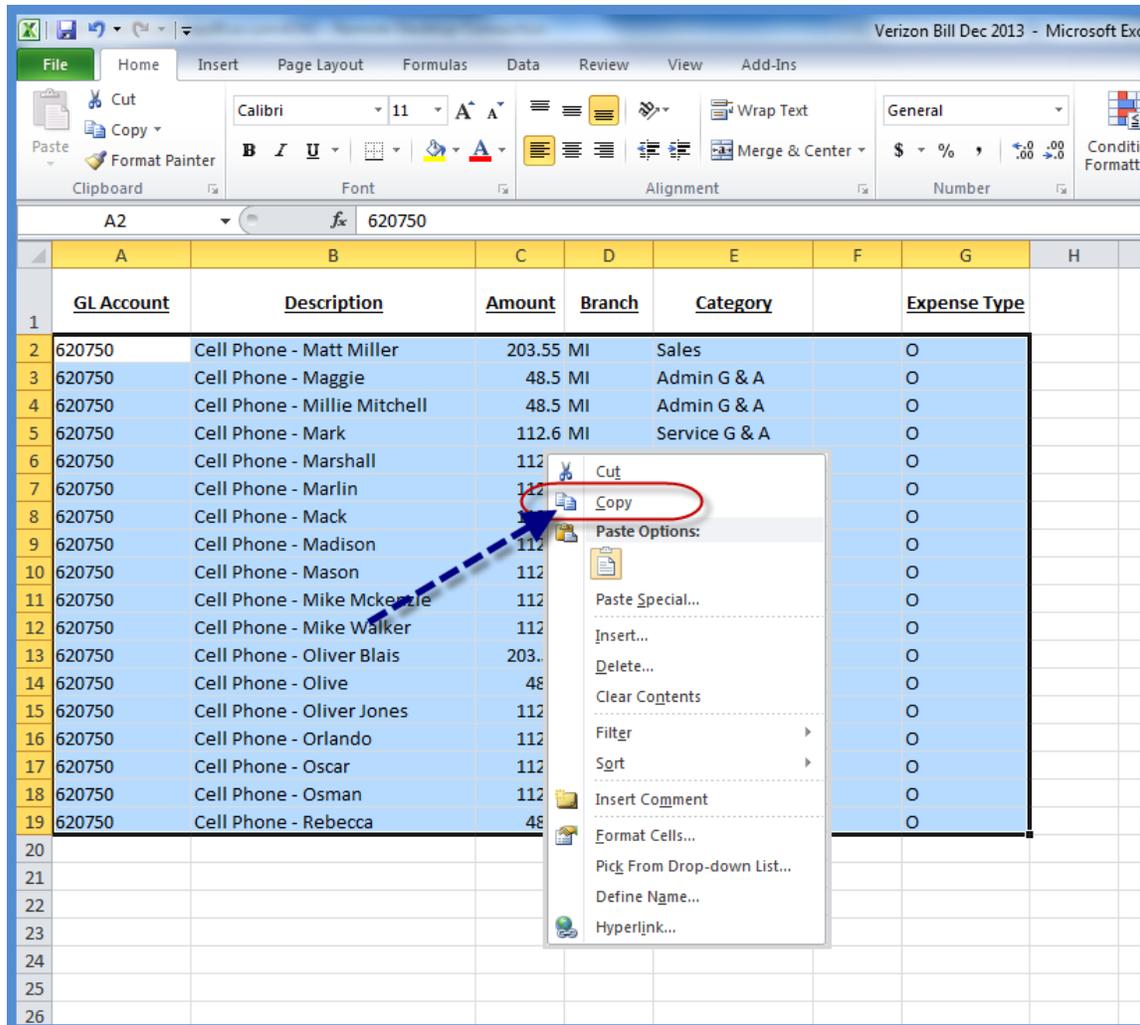
The *Import* button is located at the upper right of the form, and the *Copy* button is located at the bottom of the form. For more information on how to use these new features, continue on to the next page.

The screenshot shows the 'Bills' window in SedonaOffice. The 'Vendor' field is set to 'Verizon Wireless' and the 'Category' is 'Admin G & A'. The 'Vendor Bill' section displays the vendor's address: 'Verizon Wireless, P.O. BOX 15062, Albany, NY 12212'. The 'Reference #' and 'Branch' fields are empty, with 'MI' selected in the branch dropdown. The 'Terms' are set to 'Net 10'. The 'Amount' field is empty. The 'Bill Date' is '12/5/2013' and the 'Payment Due' is '12/5/2013'. The 'Eligible for Discount Amt' and 'Costing' fields are empty. The 'Parts' tab is selected, and the 'General Ledger' table is empty. The 'Memo' field is empty. The 'Total Balance Due' is '0.00'. The 'Copy Expenses' button is circled in red, and a callout points to it with the text 'Copy Expense Lines to the Clipboard'. The 'Import from Excel' button is also circled in red, and a callout points to it with the text 'Import from Excel'.

GL Account	Description	Amount	Branch	Category
------------	-------------	--------	--------	----------

*Application Enhancements/Improvements (continued)*

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.



*Application Enhancements/Improvements (continued)*

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.

**Bills**

Vendor: Verizon Wireless      Category: Admin G & A       Hold Payment

Vendor Bill

Vendor: **Verizon Wireless**  
Address: **P.O. BOX 15062**  
**Albany, NY 12212**

Reference #: Dec 2013      Branch: MI

Terms: Net 10      Amount: 1952.30

Bill Date: 12/5/2013      Payment Due: 12/5/2013

Eligible for Discount Amt: 1952.30      Costing:

**Parts 0.00**    Expense 1952.30    **Documents**     Show Branches     Show Job Cost

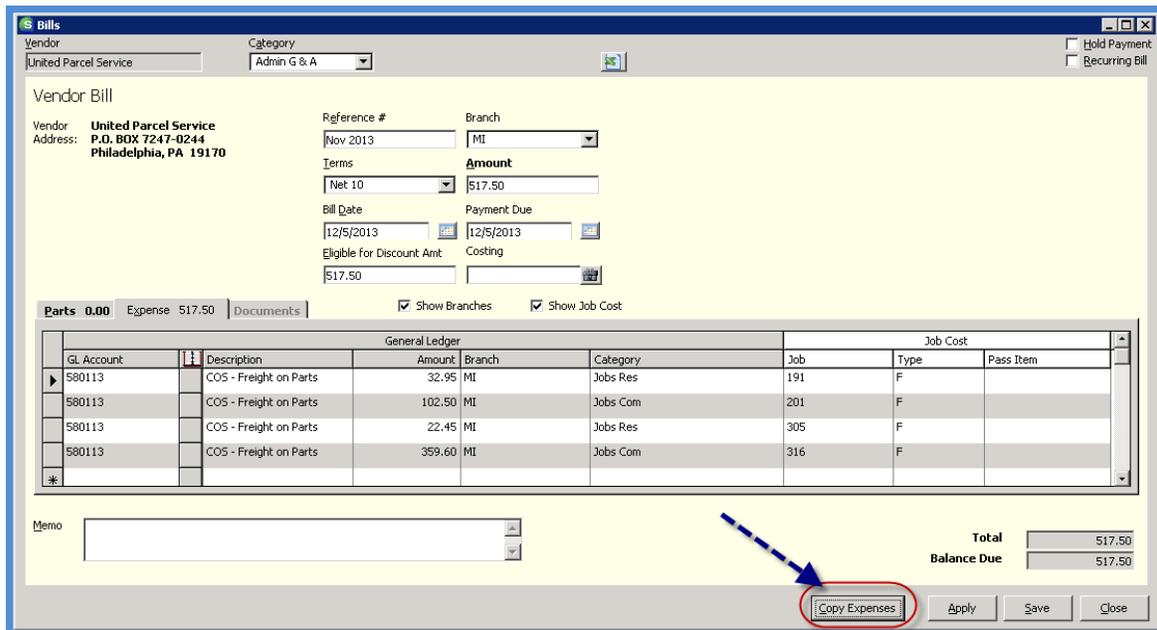
GL Account	Description	Amount	Branch	Category
620750	Cell Phone - Matt Miller	203.55	MI	Sales
620750	Cell Phone - Maggie	48.50	MI	Admin G & A
620750	Cell Phone - Millie Mitchell	48.50	MI	Admin G & A
620750	Cell Phone - Mark	112.60	MI	Service G & A
620750	Cell Phone - Marshall	112.60	MI	Service G & A

Memo:

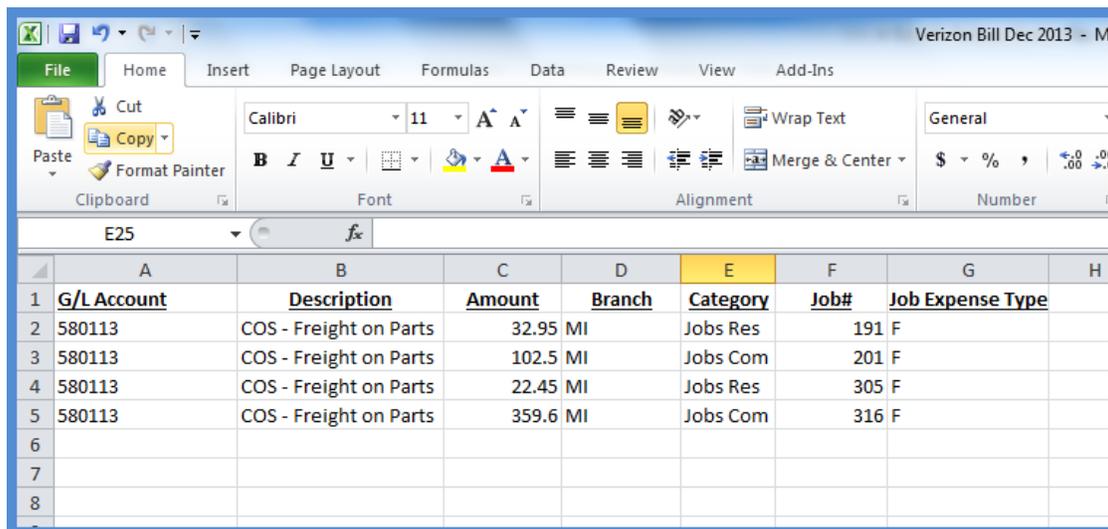
**Total** 1952.30  
**Balance Due** 1952.30

*Application Enhancements/Improvements (continued)*

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.



**Expense Lines Pasted into Excel**

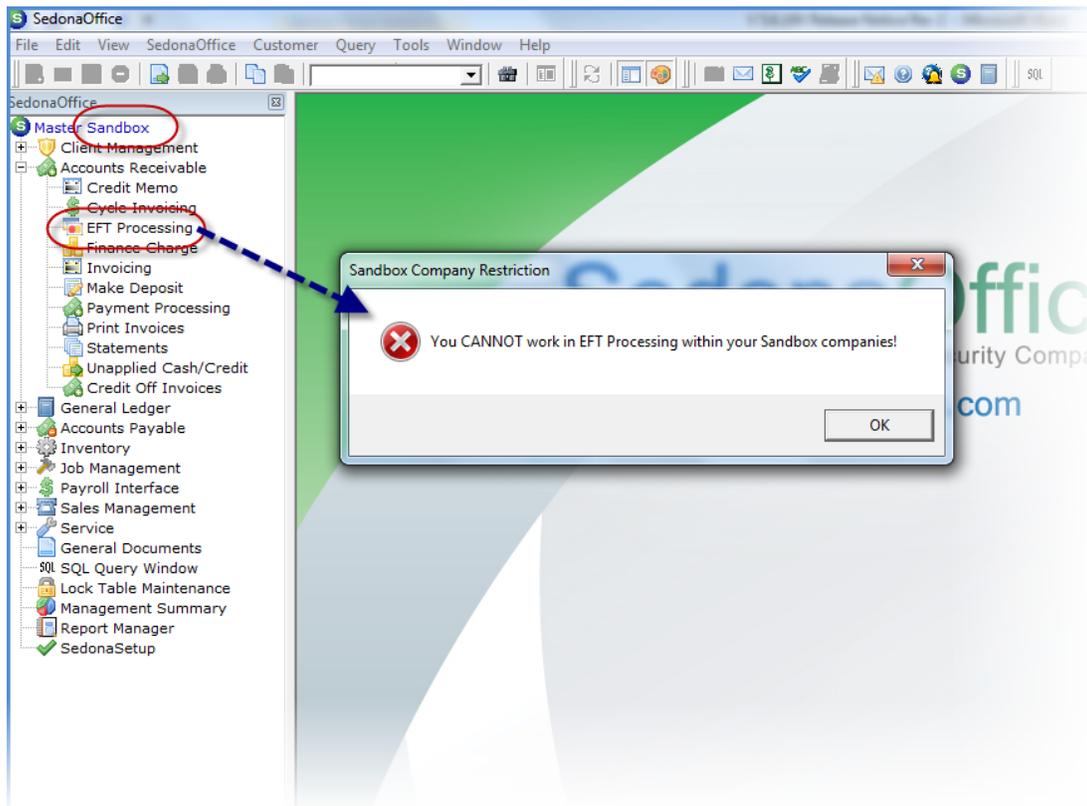


*Application Enhancements/Improvements (continued)*

**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.



*Application Enhancements/Improvements (continued)*

**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.

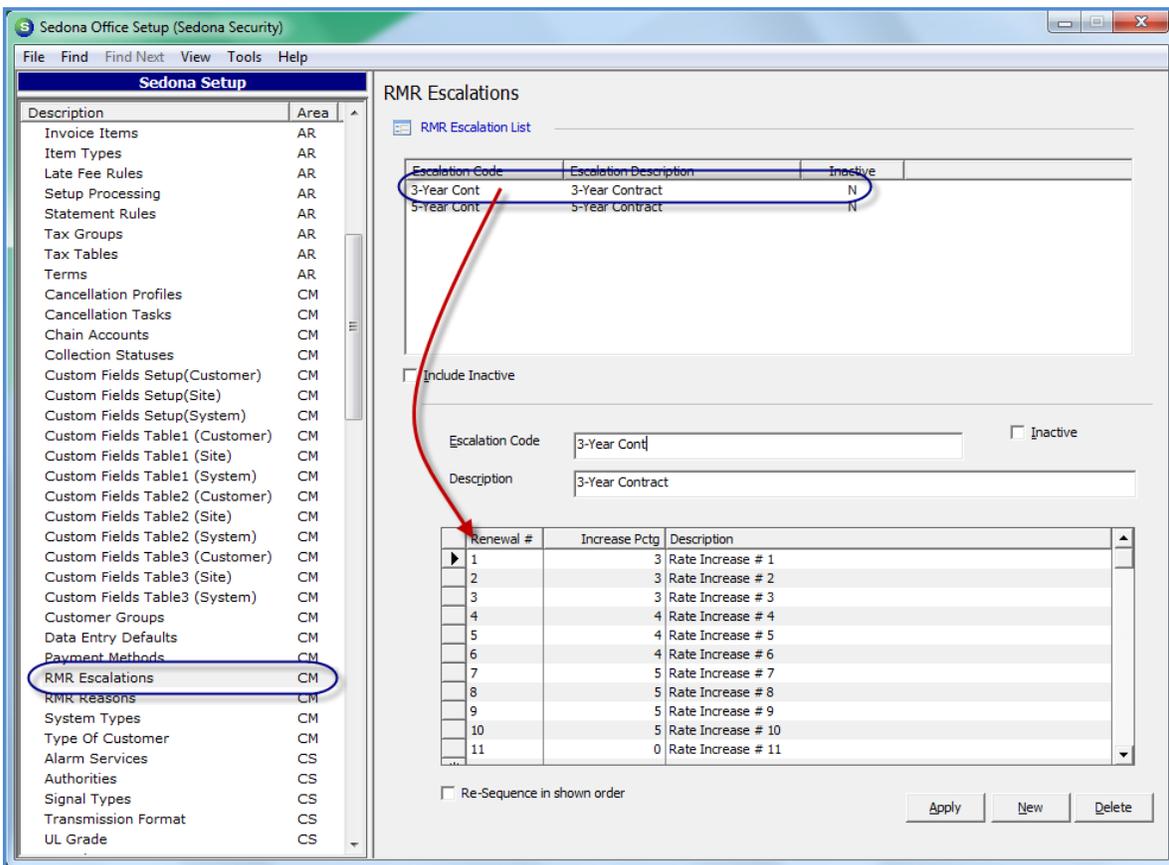
A new User Group Security option, **Access to RMR Escalations**, has been added to the CM application access tab which allows you to control which User Groups may have access to setup/manage Escalations on Recurring lines.

*Application Enhancements/Improvements (continued)*

**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.

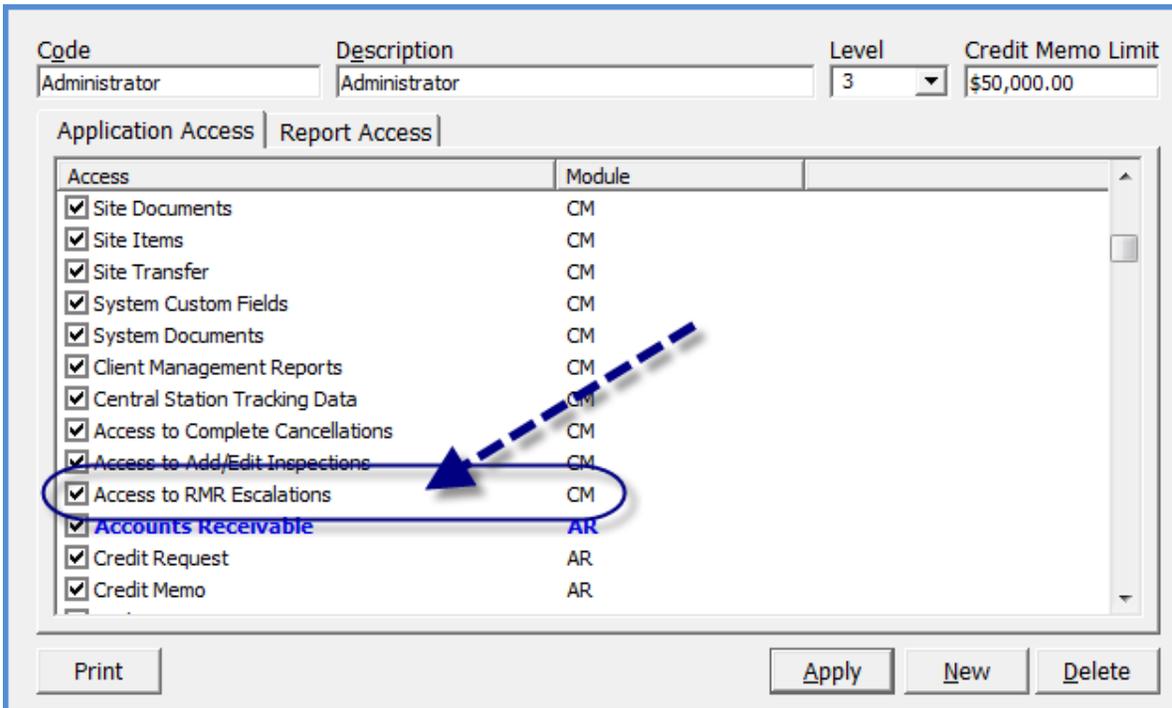
Click on the *New* button, enter the *Code* and *Description* for the RMR Escalation Code, then in the lower section enter the *Renewal Number*, *Increase Percentage* and the *Description* for the Renewal Number.



*Application Enhancements/Improvements (continued)*

**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.



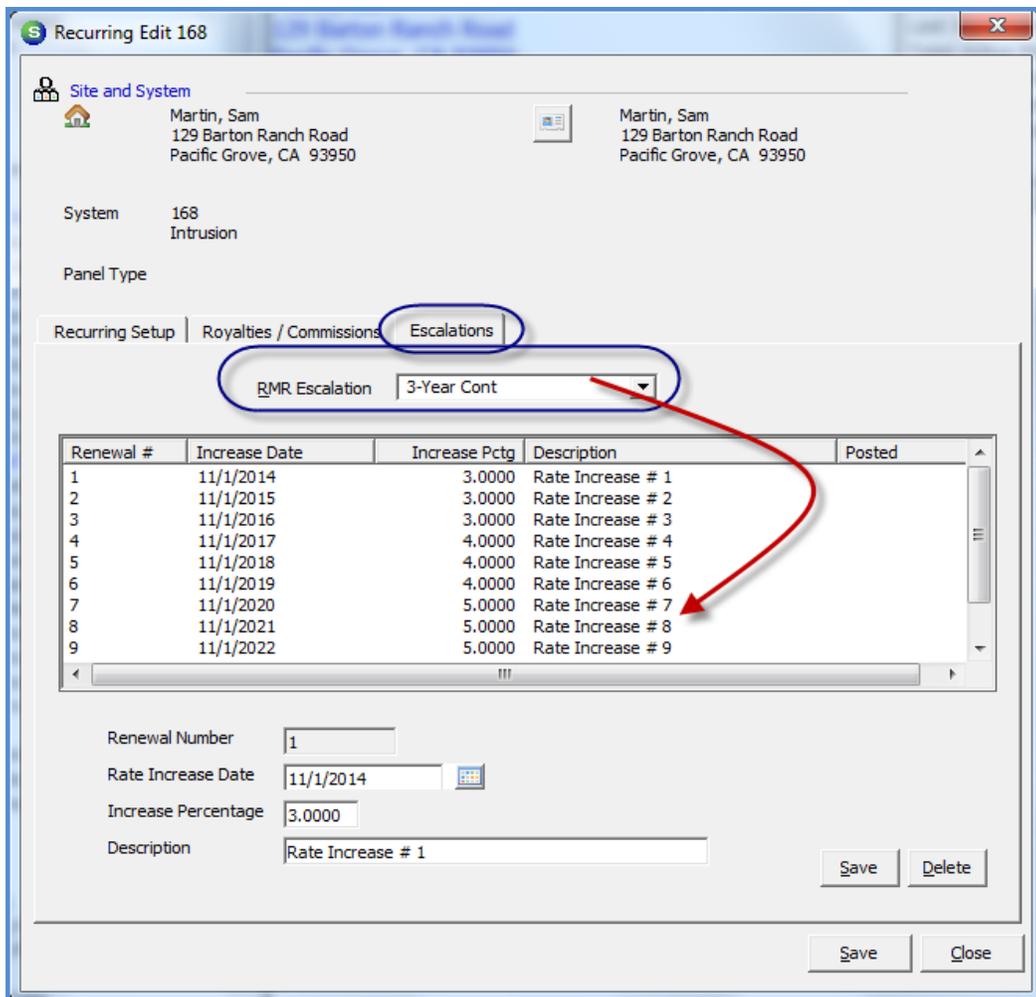
Application Enhancements/Improvements (continued)

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

Open the Recurring Line in edit mode; navigate to the new *Escalations* tab. From the drop-down 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.

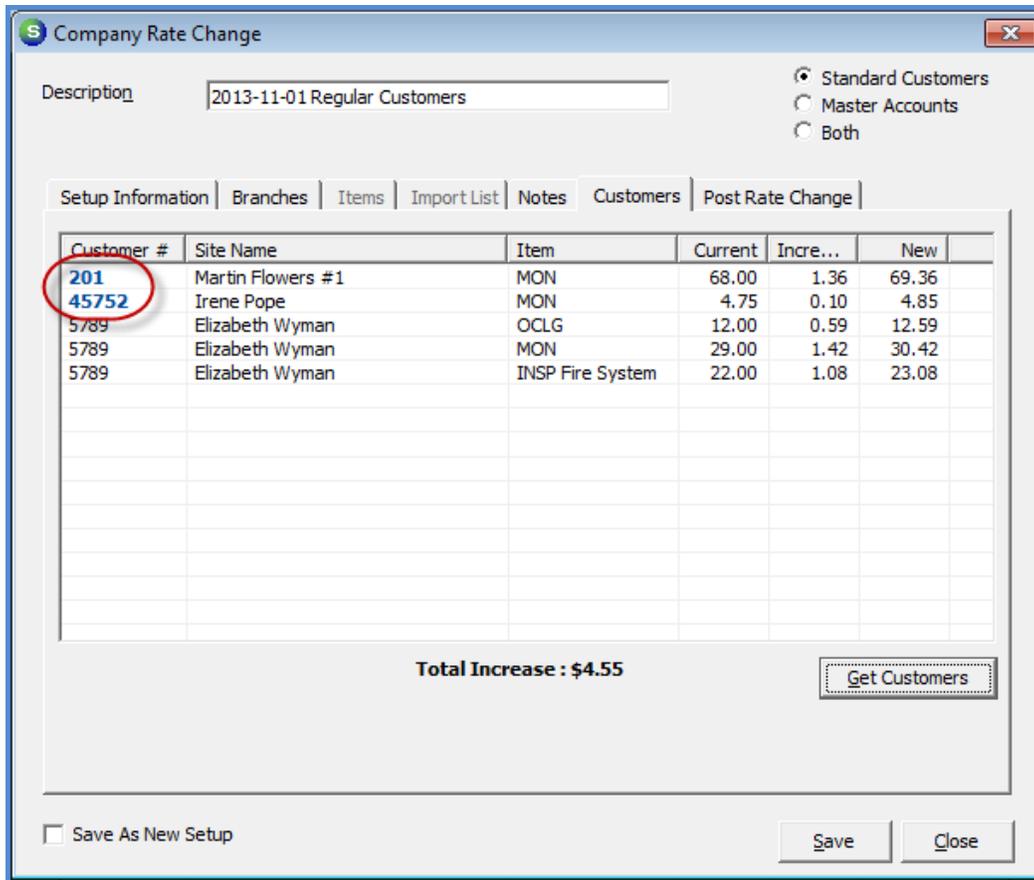
**Note: You must have a date entered into the recurring line Rate Increase date field to be able to attach an RMR Escalation schedule.**



*Application Enhancements/Improvements (continued)*

**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.



*Application Enhancements/Improvements (continued)*

**Default BillTo Address for Invoice Type**

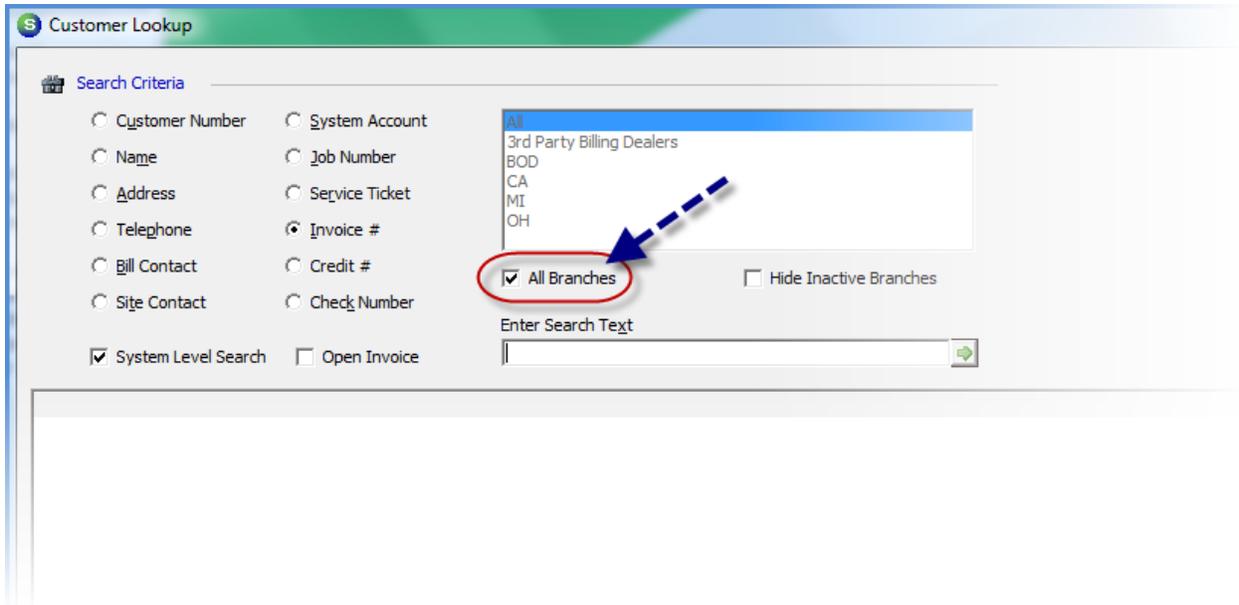
New checkboxes have been added to the customer BillTo record which allows you to select which type or types of invoices will use a specific BillTo record as the default. You may create a separate BillTo for each invoice type or use a single BillTo record for all or selected invoice types. If the customer 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.

The screenshot shows a software window titled "Customer Billing 201". The "Customer Information" section shows "Customer # 201" and "Customer Name Martin Flowers". The "Billing Information" tab is active, showing "Residential" selected and "Commercial" unselected. The "Name" field contains "Martin Industries" and the "Additional Name" field contains "Loss Prevention". The "Address..." field contains "PO Box 2541, Plymouth, MI 48170". There are fields for "Phone 1", "Phone 2", "Fax", and "Email". A red circle highlights a group of checkboxes: "Primary RMR" (checked), "Primary Service" (unchecked), "Primary Job" (unchecked), and "Primary Other" (checked). Other checkboxes include "Inactive" (unchecked), "Primary Mail" (checked), "Email Invoices" (unchecked), and "Copy Billing Address to Site" (unchecked). The text "Email Invoices Available through PDF Explode Only" is visible. "Save" and "Close" buttons are at the bottom right.

*Application Enhancements/Improvements (continued)*

**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.



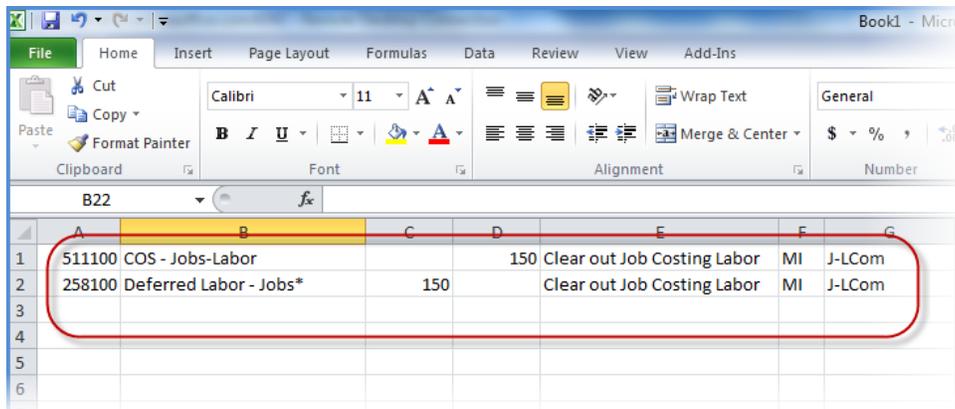
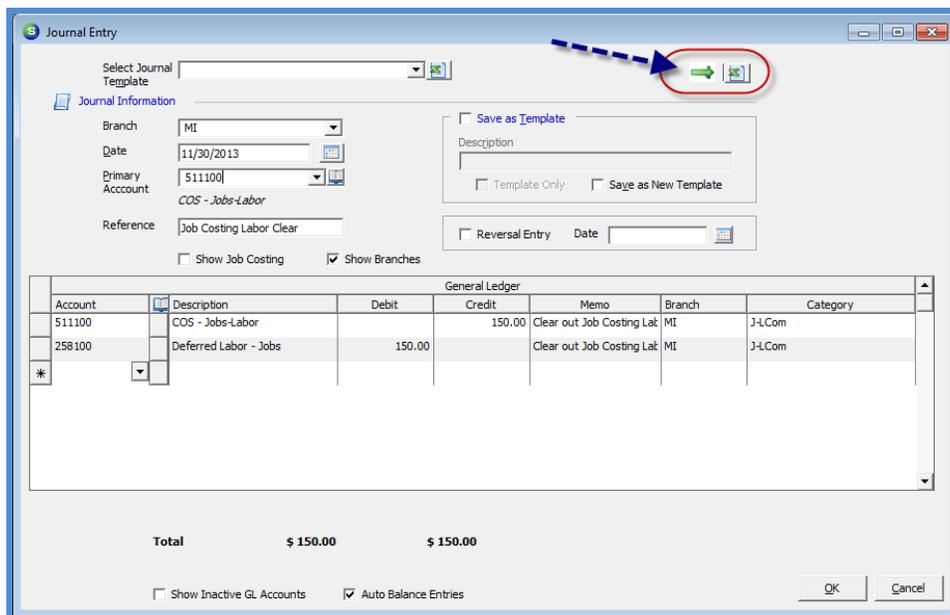
*Application Enhancements/Improvements (continued)*

**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.



*Application Enhancements/Improvements (continued)*

**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.

		<b>Count Sheet</b>						Page#	1
8:02 AM		2013-11-27 M100		M100					
<u>Part Code</u>	<u>Description</u>	<u>Detail</u>	<u>Product Line</u>	<u>Row</u>	<u>Shelf</u>	<u>Bin</u>	<u>O/H Qty</u>		
_____ ULT1240	ULTRA TECH 12V 4AH BATTERY	ULTRA TECH 12V 4AH BATTERY	Batteries	C			4		
_____ ULT1270	ULTRA TECH 12V 7AH BATTERY	ULTRA TECH 12V 7AH BATTERY	Batteries	C			6		
_____ YOUNP46	YUASA NP4 6VOLT BATTERY	YUASA NP4 6VOLT BATTERY	Batteries	C			1		
_____ 69	# 69 DOOR CORD	# 69 DOOR CORD	Contacts	C			1		
_____ EVDW4975	EVDW4975 VANISHING CONTACT	EVDW4975 VANISHING CONTACT	Contacts	C			3		
_____ GRI4532	GRI OVERHEAD DOOR SWITCH	GRI OVERHEAD DOOR SWITCH	Contacts	C			5		
_____ DSCRFK5501	DSC RFK5501 KEYPAD W/RECEIVER	DSC RFK5501 KEYPAD W/RECEIVER	DSC Security Equipment	C			1		
_____ DSCWS4945	WIRELESS DOOR/WINDOW CONTACT	WIRELESS DOOR/WINDOW CONTACT	DSC Security Equipment	C			4		
_____ FILSBIO	PULL STATION BACK-BOX	PULL STATION BACK-BOX	Enclosures/Boxes	C			1		
_____ 5808W3	ADEMCO WIRELESS SMOKE	ADEMCO WIRELESS SMOKE	Fire Equip/Smoke/Heat	C			1		
_____ FILBG12	PULL STATION	PULL STATION	Fire Equip/Smoke/Heat	C			2		
_____ 5853	ADEMCO WIRELESS GLASSBREAK	ADEMCO WIRELESS GLASSBREAK	Glass Break Detectors				-1		

**Sedona Security**

*Application Enhancements/Improvements (continued)*

**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.

**Inventory Part - 6160CR-2 (ANNUNCIATOR KEYPAD)**

**Part Code:** 6160CR-2  
**Description:** ANNUNCIATOR KEYPAD  
**Detail:** ANNUNCIATOR KEYPAD  
**Costing Method:** Standard  
**Product Line:** Keypads  
**Manufacturer:** Ademco  
**Manuf Part Code:** 6160CR-2  
**List Price:** 381.13  
**UPC:**  
**Special Order:** N  
**Sales Description:** ANNUNCIATOR KEYPAD  
**Sales Price:** \$301.13  
**Service Description:** ANNUNCIATOR KEYPAD  
**Service Price 1:** \$346.48  
**Service Price 2:** \$346.48  
**Total Qty:** 0  
**Total Value:** \$0.00

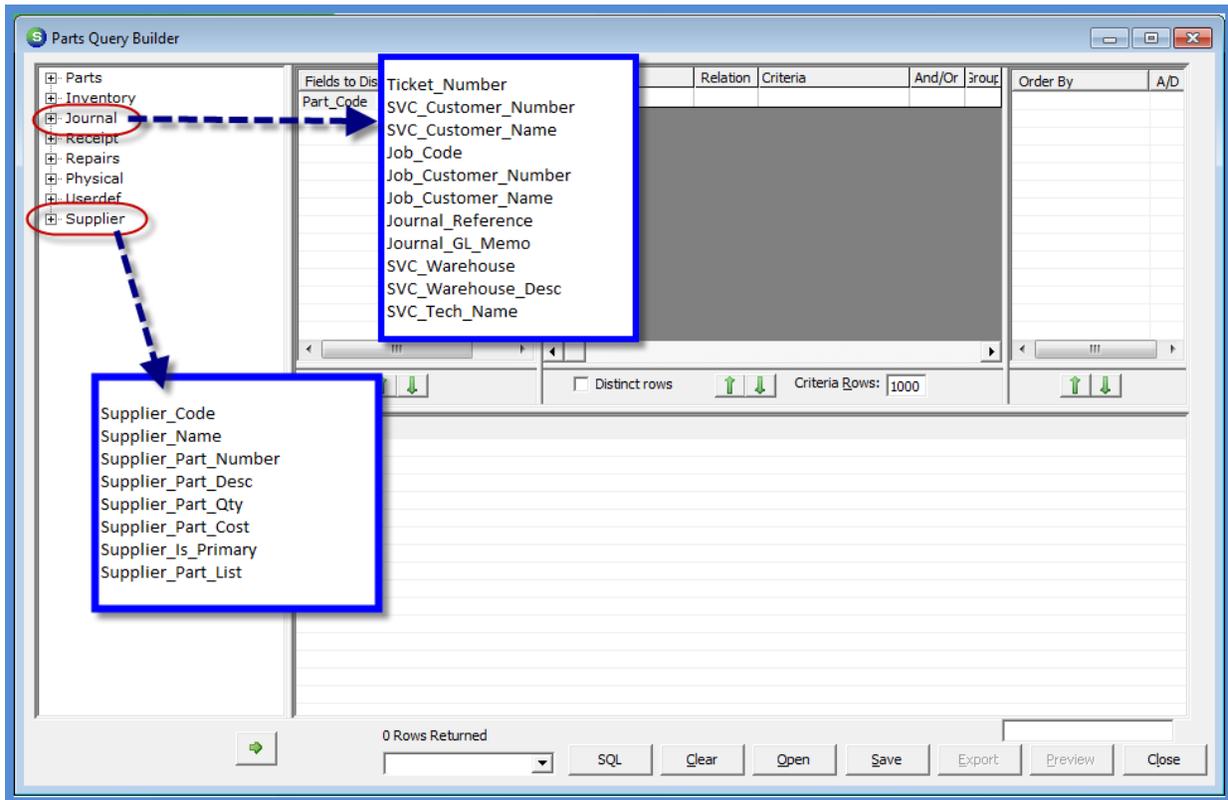
**Warehouse:** Main-OH  
**Branch:** OH  
**Account:** 120000  
**Minimum Qty:** 0  
**Maximum Qty:** 0  
**Committed Qty:** 0  
**On Hand New:** 0  
**On Order Qty:** 0  
**Out For Repair:** 0  
**In Holding Qty:** 0  
**Value On Hand:** \$0.00  
**Row:**  
**Shell:**  
**Bin:**  
**Inactive:** N

Date	Warehouse	Reference	Description	Quantity	Cost	Extended Cost	Time/Stamp
12/5/2013	Direct Exp	2799	Service	-1	153.9900	(\$153.99)	12/5/2013 10:39:53 AM
<b>Warehouse Totals:</b>				<b>0</b>		<b>\$0.00</b>	

*Application Enhancements/Improvements (continued)*

**Part Query Builder**

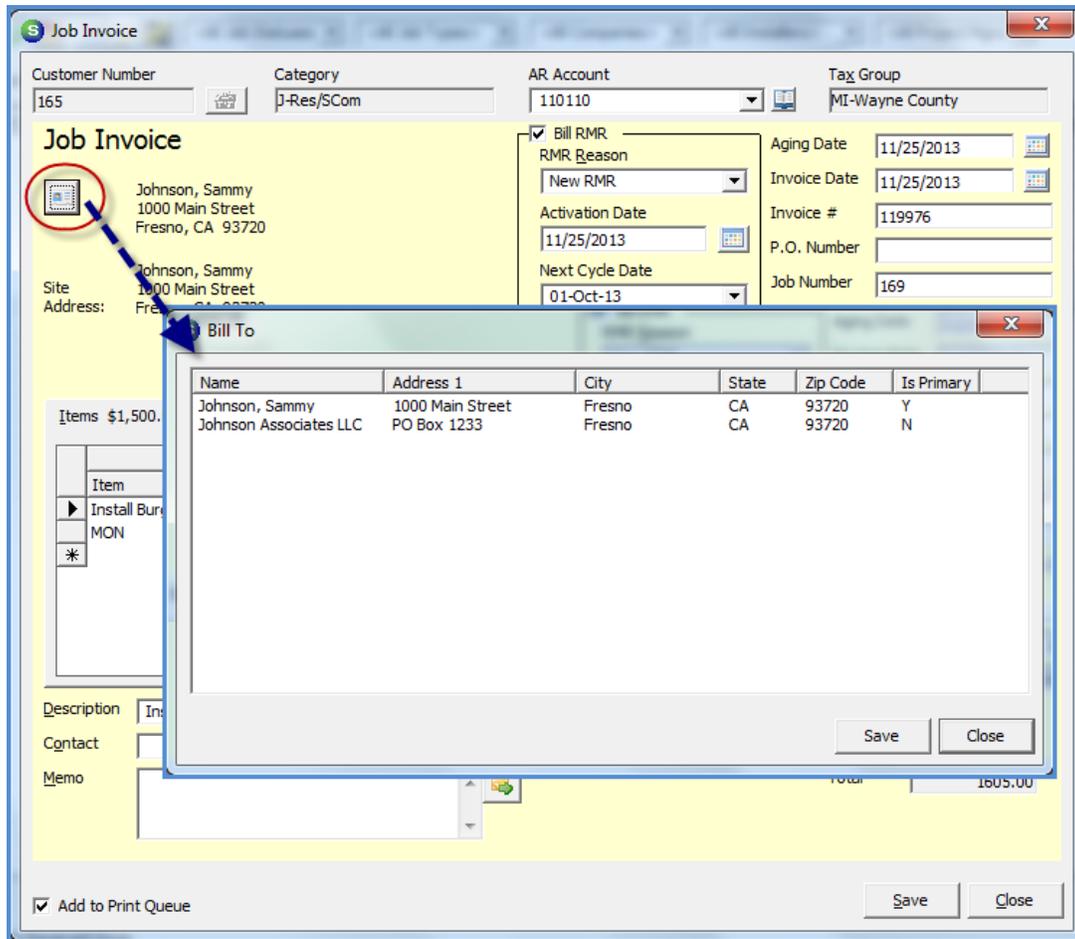
Several new fields have been added to the Part Query Builder; these fields are listed below.



**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.



*Application Enhancements/Improvements (continued)*

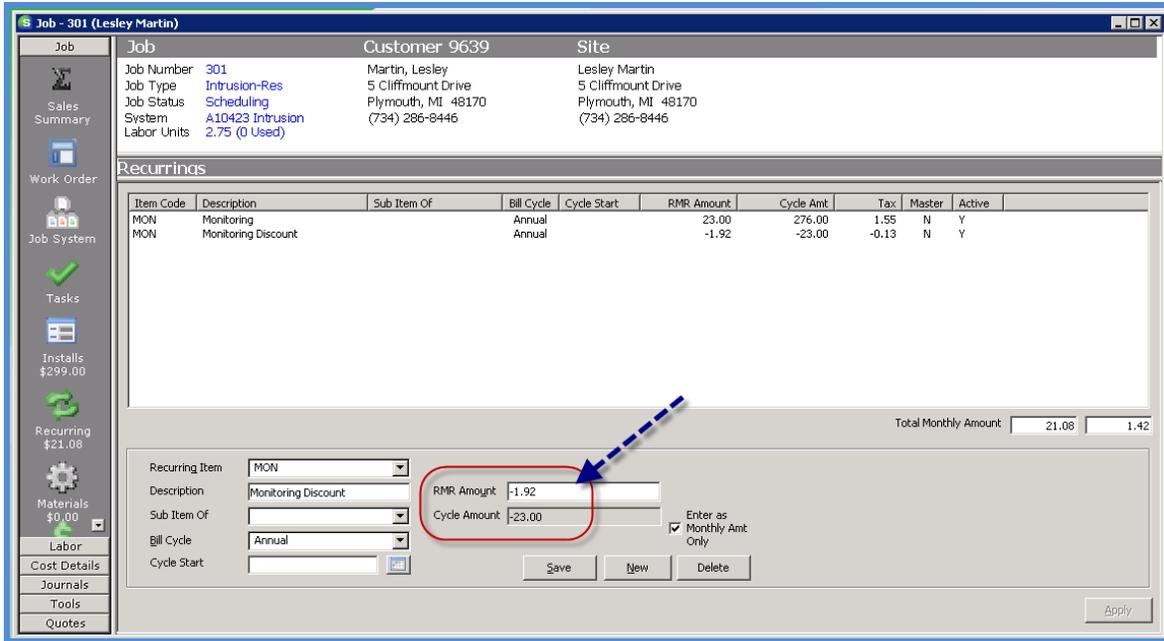
**Job Part Kits**

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.

*Application Enhancements/Improvements (continued)*

**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.



*Application Enhancements/Improvements (continued)*

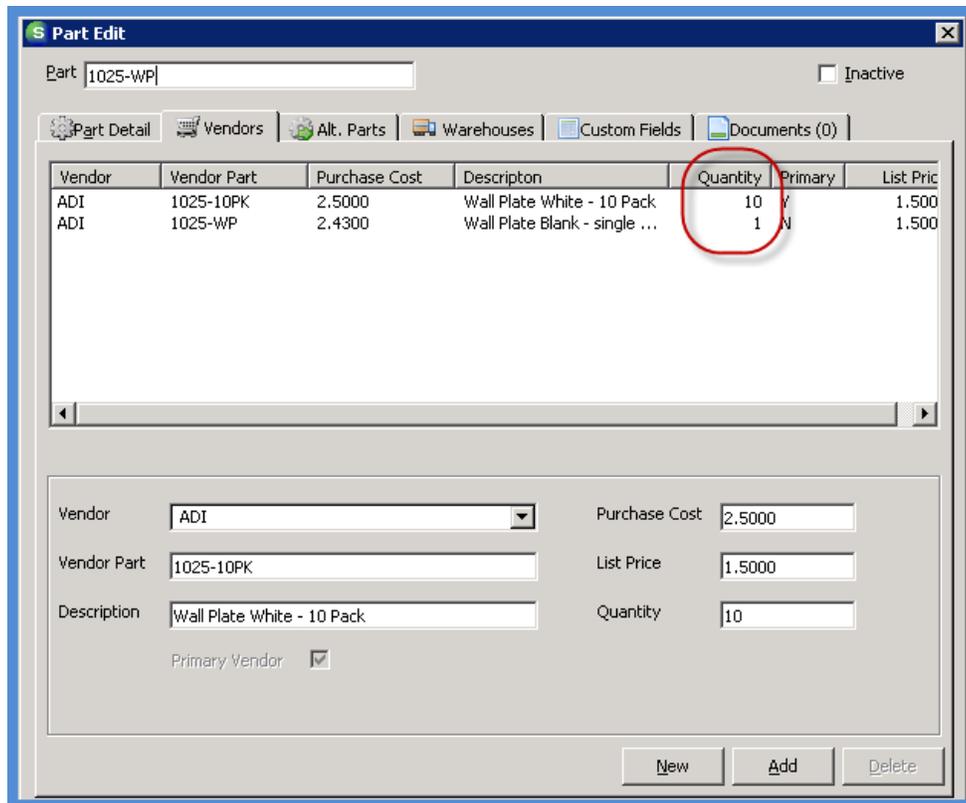
**Job Purchase Orders – Parts Purchased in Bulk Quantities**

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.



Application Enhancements/Improvements (continued)

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.

The screenshot shows the 'Prospect Entry' form with the following fields and values:

- Company: Plymouth Spring Company
- Name: Mark Larsen
- Title: Security Manager
- Address: 36588 Commercial Drive, Plymouth, MI 48170
- Status: New
- Pri. Source: Self-Generated
- Sec. Source: (empty)
- Re-Flag:
- Resolution: (empty)
- Comments: (empty)
- Master Account: 10472 (highlighted with a red circle and a blue dashed arrow)
- Temperature: HOT
- Phone 1: (734) 358-4736
- Phone 2: (empty)
- Mobile: (empty)
- Pager: (empty)
- Fax: (empty)
- Email: marklarsen@plymouthspring.com
- Sales Department: Sales
- Salesperson: George.Miller
- 2nd Salesperson: (empty)
- Next Follow Up: (empty)
- Resolution Date: (empty)

At the bottom of the form, there are several buttons and checkboxes:

- Buttons: Import, Inactive, Retain Data after Apply, Apply
- Checkboxes:  Inactive,  Retain Data after Apply

*Application Enhancements/Improvements (continued)*

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.

The screenshot shows the 'Prospect Entry' form with the following fields and values:

- Residential  Commercial
- Company: Plymouth Spring Company
- Name: Mark Larsen
- Title: Security Manager
- Address...: 36588 Commercial Drive, Plymouth, MI 48170
- Status: New
- Pri. Source: Self-Generated
- Sec. Source: (empty)
- Re-Flag
- Resolution: (empty)
- Comments: (empty)
- Master Account: 10472
- Temperature: HOT
- Phone 1: (734) 358-4736
- Phone 2: (empty)
- Mobile: (empty)
- Pager: (empty)
- Fax: (empty)
- Email: marklarsen@plymouthspring.com
- Sales Department: Sales
- Salesperson: George.Miller
- 2nd Salesperson: (empty)
- Next Follow Up: (empty)
- Resolution Date: (empty)

At the bottom of the form, there is a toolbar with buttons for 'Import', 'Inactive', 'Retain Data after Apply', and 'Apply'. The 'Retain Data after Apply' checkbox is highlighted with a red circle, and a blue dashed arrow points to it from the 'Comments' field.

*Application Enhancements/Improvements (continued)*

**SedonaService**

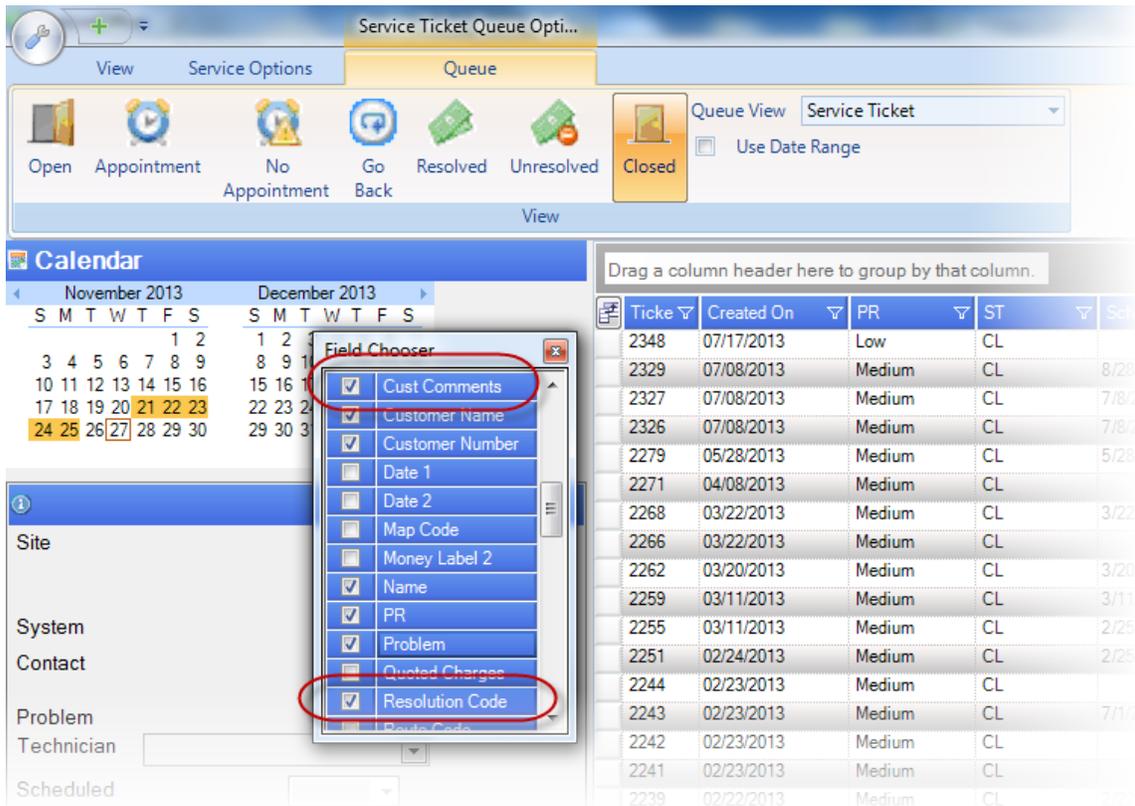
**SedonaSchedule**

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.

Application Enhancements/Improvements (continued)

**Ticket Queue**

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



*Application Enhancements/Improvements (continued)*

**Ticket Parts Reconciliation**

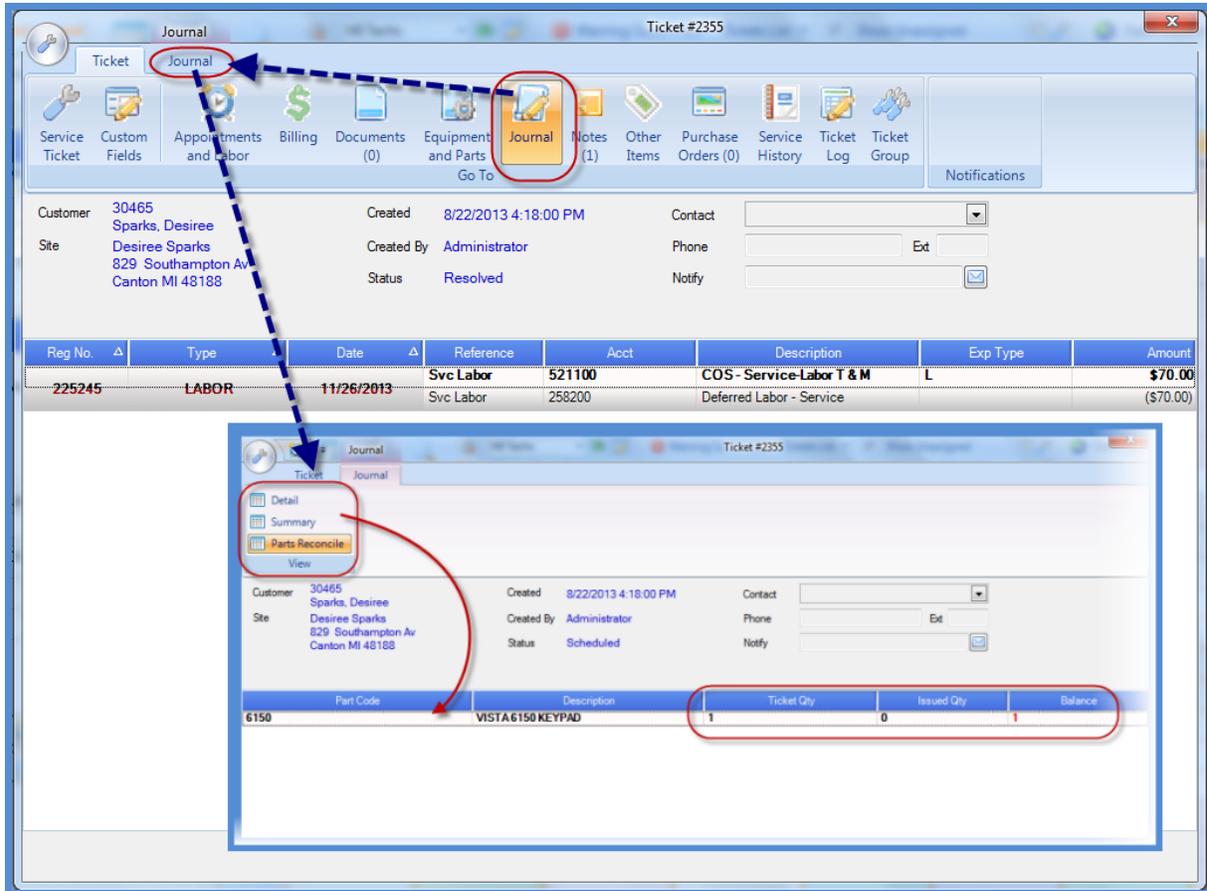
Tickets have been enhanced to now reconcile the Parts used on a ticket prior to being able to invoice a ticket. If the ticket is non-billable, the parts reconciliation check is performed when attempting to close the ticket.

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.

*Application Enhancements/Improvements (continued)*

**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.



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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* were 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.