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SedonaOffice Release Notice

SedonaOffice

Version 5.6.209

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

Table of Contents

Application Enhancements/Improvements

Client Management

Inspection Setup

A new tab has been added to the Inspection Setup labeled "Inspection Items". This new form provides an area where you may create a list of Items that need to be Inspected. The drop-down list in the Description field is maintained in a new setup table in SedonaSetup, labeled "Inspection Items". This new setup table is located in the Service (SV) area of SedonaSetup.

Currently this information is for internal purposes only and does not print on the inspection ticket.

Note: For those who design reports outside of SedonaOffice, the rows listed in the Inspection Items List is stored in a new table: sv_inspection_task and joins to the inspection record in sv_inspection on the field inspection_id.

When adding new rows to the Inspection Items list, three fields are available:

- Description – Selectable from records previously entered into the Inspection Items setup table.
- Contract Quantity – enter the number of items which your company is contractually obligated to inspect.
- Actual Quantity – this number is filled in later once the Inspector reports back how many of the Items were inspected.

Application Enhancements/Improvements (continued)

Client Management *(continued)*

Contact Telephone Extension

A change was made to the data entry form when entering phone numbers for Billing or Site Contacts. Previously, a separate field was available for entering an extension number; now the extension number in entered into the same field as the telephone number. If more than 10 digits are typed into phone 1 or phone 2 for a contact, any digit beyond 10 is assumed to be an extension and will be displayed as such.

Application Enhancements/Improvements (continued)

SedonaSchedule

A new field has been added to the Service Ticket form labeled *Service Coordinator*. Clicking on the drop-down arrow to the right of this field will display all active employees in the Employee setup table. This field is provided for a company to assign an employee to manage the ticket.

The *Service Coordinator* field has also been added to the list of available fields [Field Chooser] to display within the Ticket Queue.

Application Enhancements/Improvements (continued)

SedonaSchedule *(continued)*

The Close Ticket checkbox that was previously located at the upper left corner of the Service Ticket form has now been changed to a Button located at the lower right of the Service Ticket form.
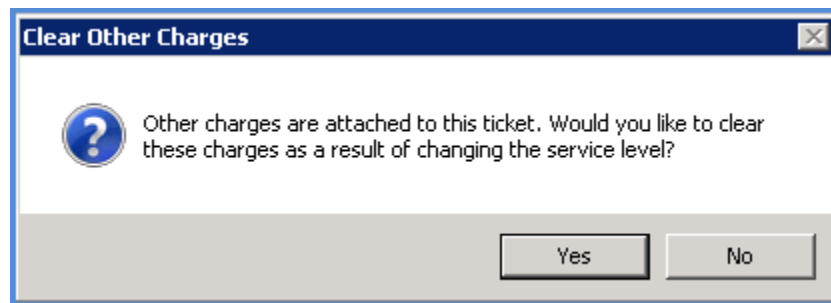
Application Enhancements/Improvements (continued)

SedonaSchedule *(continued)*

Changing a Ticket Service Level

When a Service Ticket is created and the default Service Level of the Ticket includes an "Other" charge as part of the service level setup, if the User changes the Service Level, a new pop-up message box will be displayed asking the User if they would like to clear the "Other" charges. If yes is selected, all "Other" charges will be removed from the ticket. If no is selected, all "Other" charges will not be removed from the ticket.

Application Enhancements/Improvements (continued)

SedonaSchedule *(continued)*

New fields have been added to the Job List field chooser; Description and Projected End Date. Both of these fields are entered on the Job Work Order form.

Application Enhancements/Improvements (continued)

SedonaSchedule *(continued)*

With the release of version 5.6.206/207 a new feature was added to the Ticket Journal – Parts Reconcile. Many of our customers have indicated they would like to be able to turn off this feature due to the internal timing of transactions.

A new User Group security option has been added to allow your company to "Override" the Parts Reconcile feature. This permission is at the User Group level (not company-wide).

Application Enhancements/Improvements (continued)

Job Query Builder

A new Query Builder has arrived on the scene with the release of version 5.6.209 – Job Query Builder (JQB). This new query builder is available through User Permissions as all of the other query builders.

Keep in mind this is the JQB 1.0. If you have any suggestions for additional fields or groups for the JQB, please open support ticket with your request which we will be happy to review.
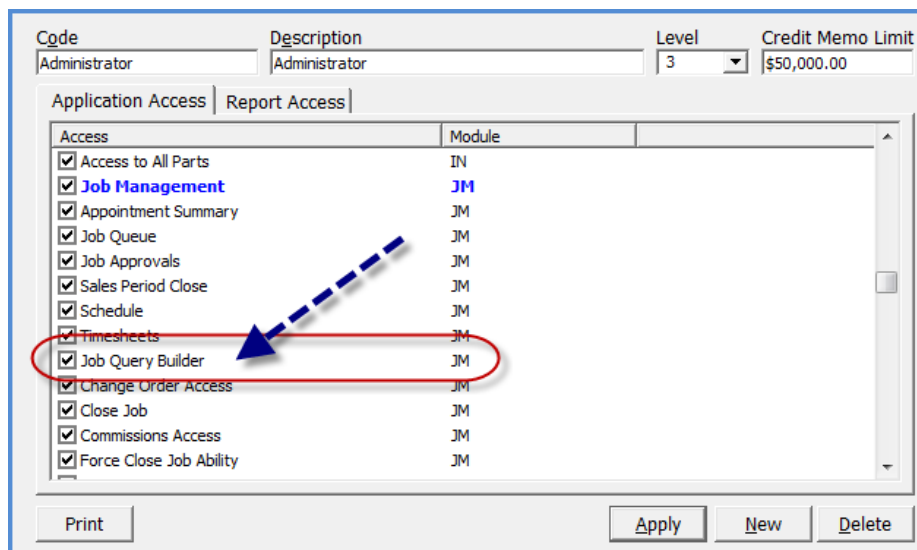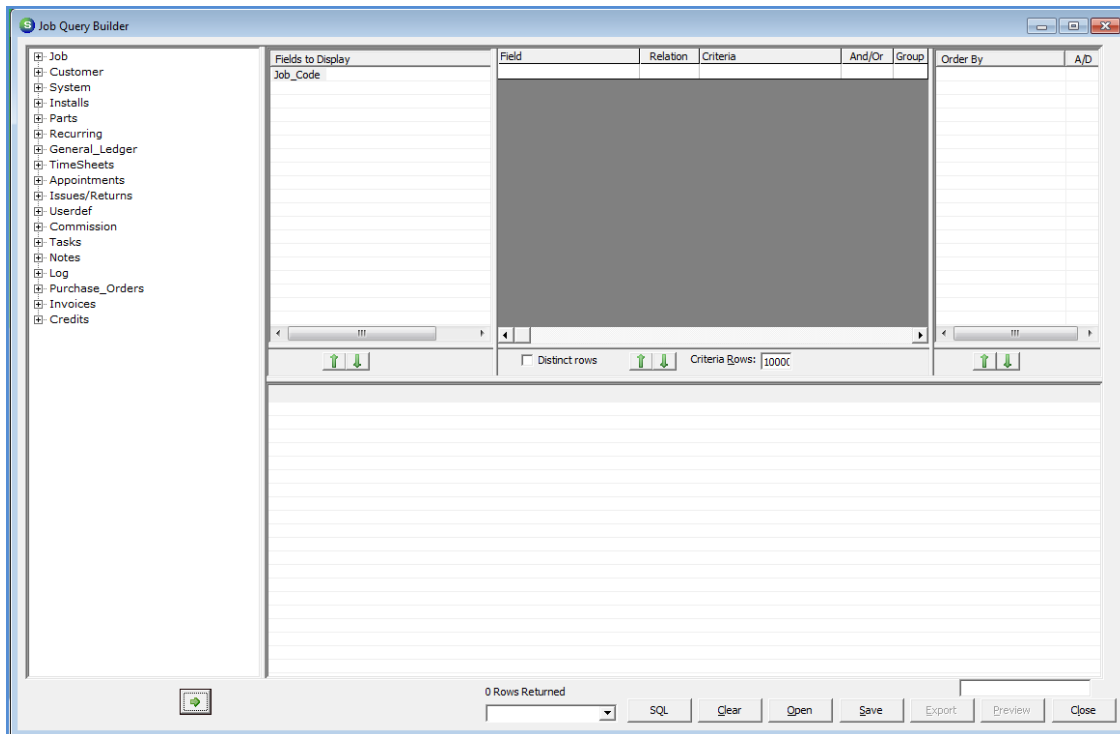
Application Enhancements/Improvements (continued)
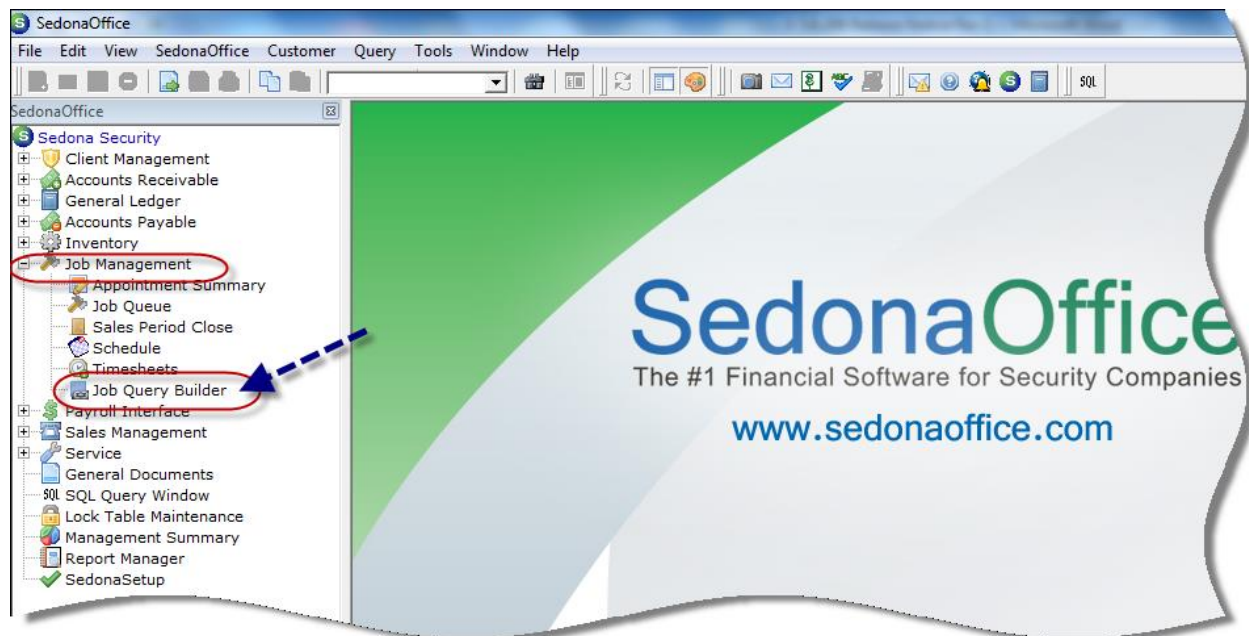
Application Corrections

Accounts Payable

- **Vendor Phone Numbers with Extensions**: Corrected a reported issue; if an extension had been entered as part of the contact phone number, the extension was not being displayed.

Accounts Receivable

- **Voided EFT's**: Corrected a reported issue; if an EFT transaction was voided, the message of the Pending EFT was still being displayed on the invoice form.

Job Management

- **Job Timesheets**: Corrected a reported issue; when entering timesheets into a Timesheet Batch or individually within a Job, if the date, installer, job task, and amount of hours was the same as a previously entered timesheet, the application would not allow the save thinking it was a duplicate record. Now if a unique labor task is selected as well as unique values for the date, installer, job task and hours is entered, the record will be saved.

SedonaSchedule

- **Ticket Technician**: Corrected a reported issue; if an appointment was scheduled with a particular Technician and then rescheduled with a different Technician, the Technician name on the Service Ticket form (front page) was not updating with the new Technician's name.
- **Ticket Creation/Close**: Corrected a reported issue; if a ticket was created and resolved and attempted to be closed all in one step, unpredictable behavior was occurring on the ticket. The application has been changed so that now after selecting the Problem Code and Resolution Code, the User must click the Save button, then return to the Service Ticket form to click on the Close Ticket button.

Application Corrections (continued)

SedonaSchedule (continued)

- **Job Queue:** Corrected a reported issue; When the Job List is configured to Auto Refresh, grouping and filtering settings were being removed each time the queue was refreshed.
- **Ticket Billing**: Corrected a reported issue; if a system was still under warranty and parts or labor hours were on the ticket, when clicking on the Override Warranty checkbox, the amounts for parts and labor did not refresh correctly.
- **Ticket Manual Labor**: Corrected a reported issue; the Manual Labor checkbox was not remaining selected when navigating to another form on the ticket.
- **Unscheduled Ticket List & Ticket Queue**: Corrected a reported issue; if no Technicians were linked to the Service Company assigned to the ticket, the Ticket was not being listed in the Unscheduled Ticket List or the Ticket Queue.
- **Changing Technician Dispatch Times**: Corrected a reported issue; if making changes to the date/time of a Technician Dispatch, and the accounting period of the original dispatch date is now closed, the application was posting to the closed accounting period. The application will now create a negative entry to reverse out the previous dispatch amounts and create a new entry in the current accounting period for the corrected dispatch times.
- **Ticket Appointments marked as Firm**: Corrected a reported issue; if an appointment was marked as Firm, you were not able to double-click to open/edit the dispatch form.
- **Quick Access Toolbar**: Corrected a reported issue; the Quick Access Toolbar was not being saved when closing and re-opening SedonaSchedule.
- **Google Maps**: Corrected a reported issue; the latest version of Google Maps was not functioning when attempting to map the Technician's route for the day.

Report Manager

- **RMR Customer Detail**: Corrected a reported issue; The Grand Total amount was not displaying the rightmost digit if the total amount was in the millions.