SedonaOffice Release Notice

SedonaOffice

Version 5.6.212

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

Table of Contents

Application Enhancements/Improvements

Client Management

Show Inactive Site & Systems

Option was added to the View menu – "Show Inactive Sites and Systems". When selecting this option and viewing a Customer Explorer record that contains an inactive Site and/or System, you will be able to access the customer tree functions as if it were an active Site/System. You will also have access to any documents attached to the Site/System.

Application Enhancements/Improvements (continued)

Client Management (continued)

Job Notes

A new notes folder, *Job Notes*, has been added to the Customer Tree within the Customer Explorer. The Job Notes folder is show at the Site level and the Customer Level. Any note entered on a Job will be displayed in this new folder.

Application Enhancements/Improvements (continued)

Job Management

Job Parts Warranty

An enhancement has been made to the application which will now populate warranty information on the parts that are loaded to the System Equipment list when a Job is closed. The new warranty information on System Equipment is currently for informational purposes.

When a Job is closed, two new fields on the Equipment form, *Manuf Warranty* and *Manuf Exp Date* will fill in with information related to the manufacturer's warranty.

On the Equipment form, the Manuf Warranty [code] will default from the new Manuf Warranty Code located on the Part Setup. The Manuf Exp Date will be calculated based upon the length of time related to the Part Manuf Warranty code. The Equipment Warranty Start Date will be set to the most recent Part Issue Date from the Job.

Note:

1) When updating your database to SedonaOffice version 5.6.212, the *Manuf Warranty* for all parts will automatically be set to <u>No Warranty</u>. These may be changed manually by opening a part record in edit mode, and making a selection from the drop-down list. If your company requires assistance in changing the default part warranty code, submit a support ticket; this time is billable.

2) The list of available *Manuf Warranty Codes* is displayed in the screen shot below. This is a system controlled list. If your company requires any additional Warranty Codes that do not appear on the list, please submit a support ticket with your requested value(s).
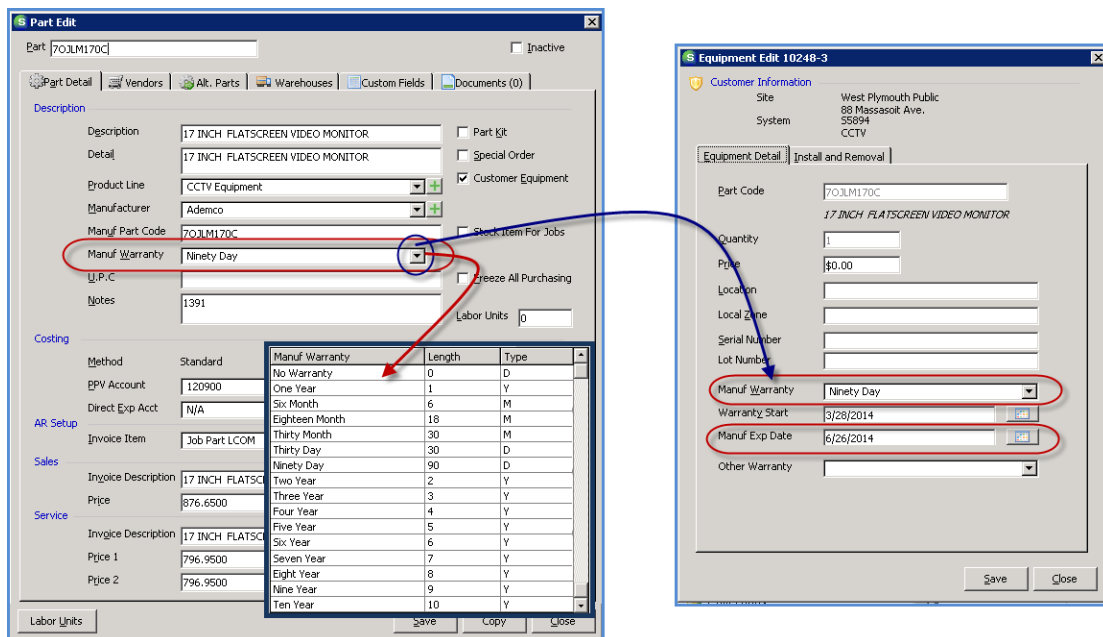
Application Enhancements/Improvements (continued)

SedonaSchedule

No-Dispatch Job Appointments

A new option for Job Appointments is now available – No-Dispatch Appointments. This feature is designed for SedonaOffice customers who wish to schedule Job Appointments that will appear on the Schedule Board, do not want to enter dispatch times for these appointments, and yet be able to know whether the appointment was completed.

This option is only available if the *Install Company* indicated on the Job Work Order form is set for "Completed Only" appointments.
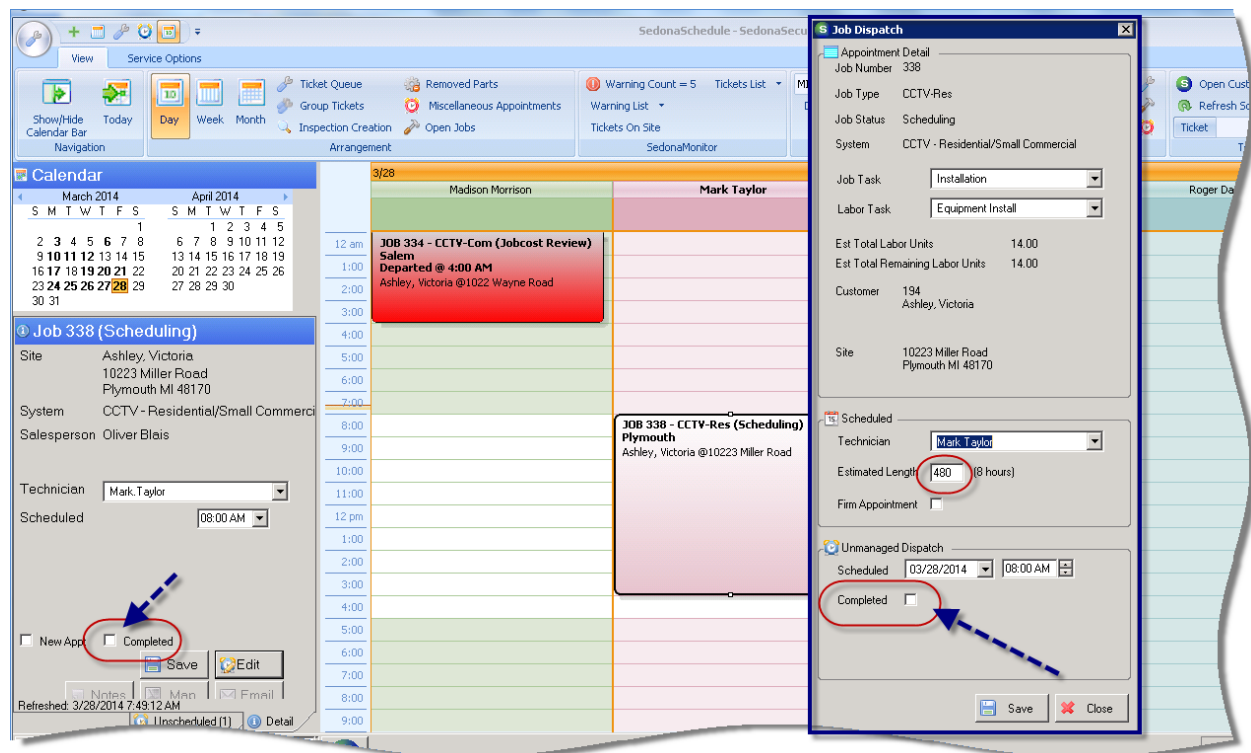
Application Enhancements/Improvements (continued)

SedonaSchedule (continued)

No-Dispatch Job Appointments (continued)

There are two methods for marking a Job Appointment as "Complete":

- From the Schedule Board, click once on the Job Appointment to fill in the Job Detail area, then check the *Completed* checkbox and then click the *Save* button.
- From the Schedule Board, click once on the Job Appointment, and then click on the *Edit* button in the Job Detail area. This will open the Job Dispatch form. Here you may check the *Completed* checkbox and then click on the *Save* button.

  If the amount of time spent on the Job Appointment was more or less than originally scheduled, prior to selecting the Completed checkbox, you may enter the number of minutes actually worked in the Estimated Length field. It is not required to enter the actual total number of minutes - this is for informational and reporting purposes only.

Application Enhancements/Improvements (continued)

SedonaSchedule (continued)

Overnight Appointments

Appointments for both Tickets and Jobs may now be scheduled to span from one day to the next day. In the example below, the Job Appointment spans from March 27th 8:00 pm through March 28th 4:00 am.
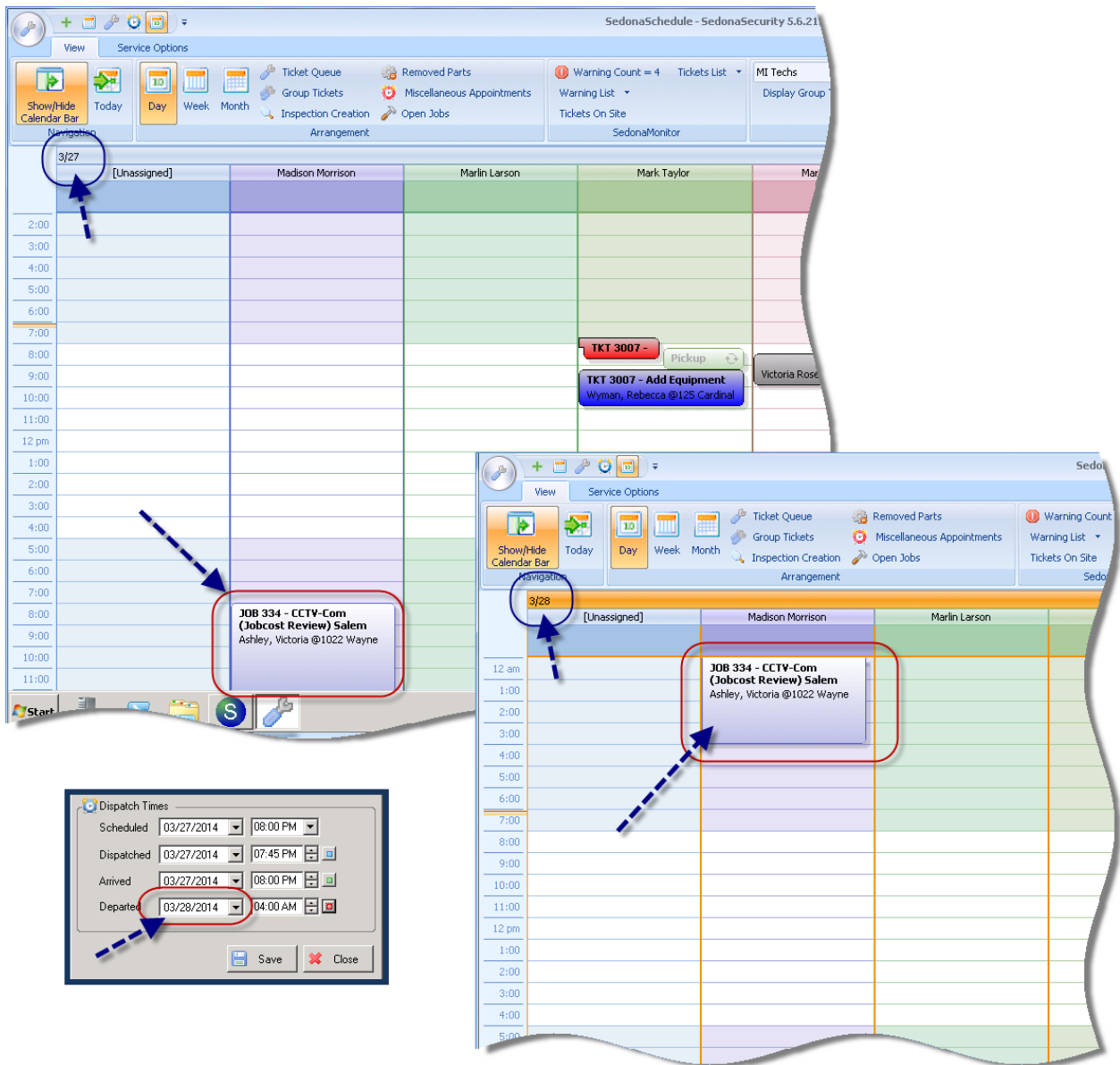
Application Enhancements/Improvements (continued)

SedonaSchedule (continued)

Overnight Appointments (continued)

Please note: when entering the departure time, you must enter the date as well.
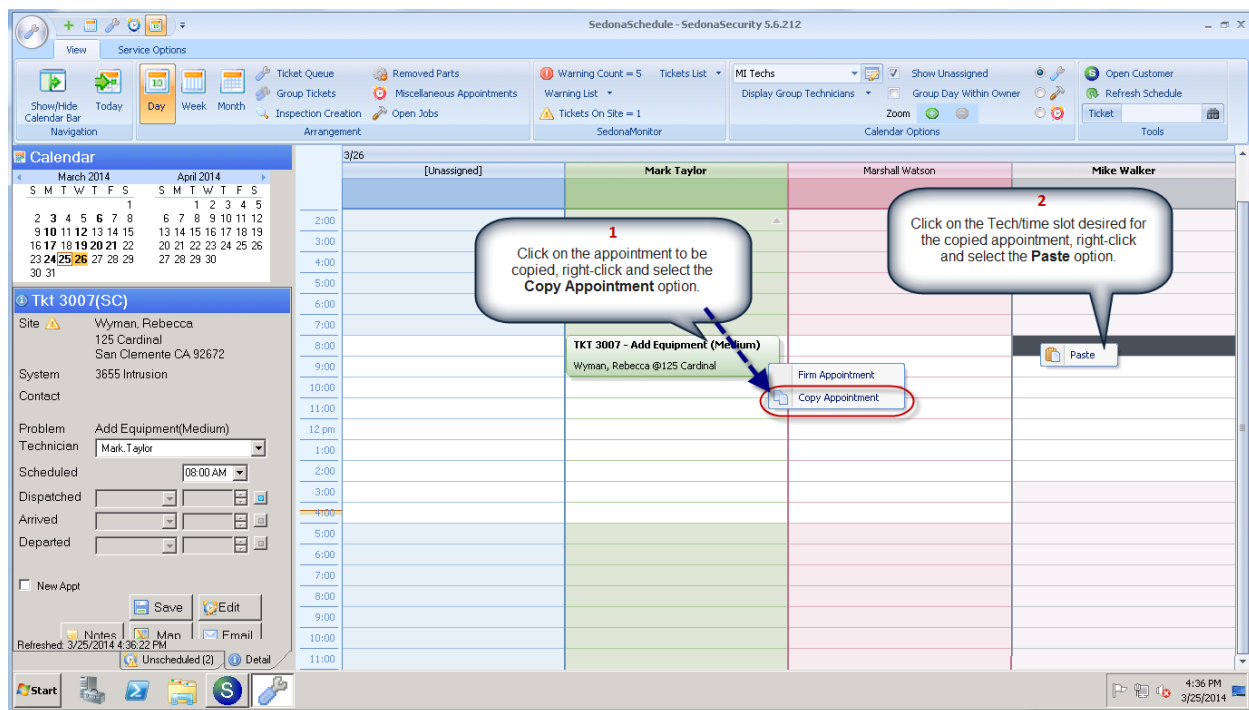
Application Enhancements/Improvements (continued)

SedonaSchedule (continued)

Copy Appointments

Appointments for both Tickets and Jobs may now be copied to the same or a different Technician on the same day or a different day.

To copy an appointment, on the Schedule Board, click once on the appointment to be copied, right-click and select the option *Copy Appointment*. Either on the same day or a different day within the Schedule Board, locate the Tech/appointment slot of where you want to paste the copy of the appointment; click once on the desire timeslot, right-click and select the option *Paste*. The new appointment will be created for the same length of time as the appointment that was copied.

Note: The Copy function is not available for Tickets that have been invoiced or closed and for Job where the Job Status is Closed or Reversed.

Application Enhancements/Improvements (continued)

SedonaSchedule (continued)

Appointment Clock Out / In Feature

A new feature has been added to SedonaSchedule which allows you to clock out a Technician on a scheduled and dispatched appointment and clock back in. The Clock-In/Clock-Out feature facilitates managing down-time for technicians and installers. This applies to both Job and Ticket Appointments. When clocking out of a Ticket or Job appointment, the original amount of time scheduled displays on the Schedule Board ensuring that a Scheduler always knows when an employee is available or busy.

To be able to Clock Out on a Technician appointment, the appointment must be either dispatched or arrived. Once an appointment has been departed, the Clock Out/Clock In feature is no longer available.

How it Works

When Clocking Out on an appointment, the application ends the original appointment and creates a Miscellaneous appointment that will span to the end of the originally scheduled appointment. When Clocking In, the Miscellaneous appointment is ended and a new Technician Appointment is created for the remaining duration of the original appointment.

When the Clock-Out is selected, the User selects from the Miscellaneous Appointment Types for the reason of the Clock-out. When Clocking back in, the User may select from the Job Labor Tasks for the type of Labor being performed for the remainder of the appointment. For Jobs, when creating the Job Appointment, if a Labor Task was selected from the Job Scheduling form, this Labor Task will be the default when the Clock-In is performed. If no Labor Task was selected, when originally scheduling the Job, the user will need to make a selection from the drop-down list.

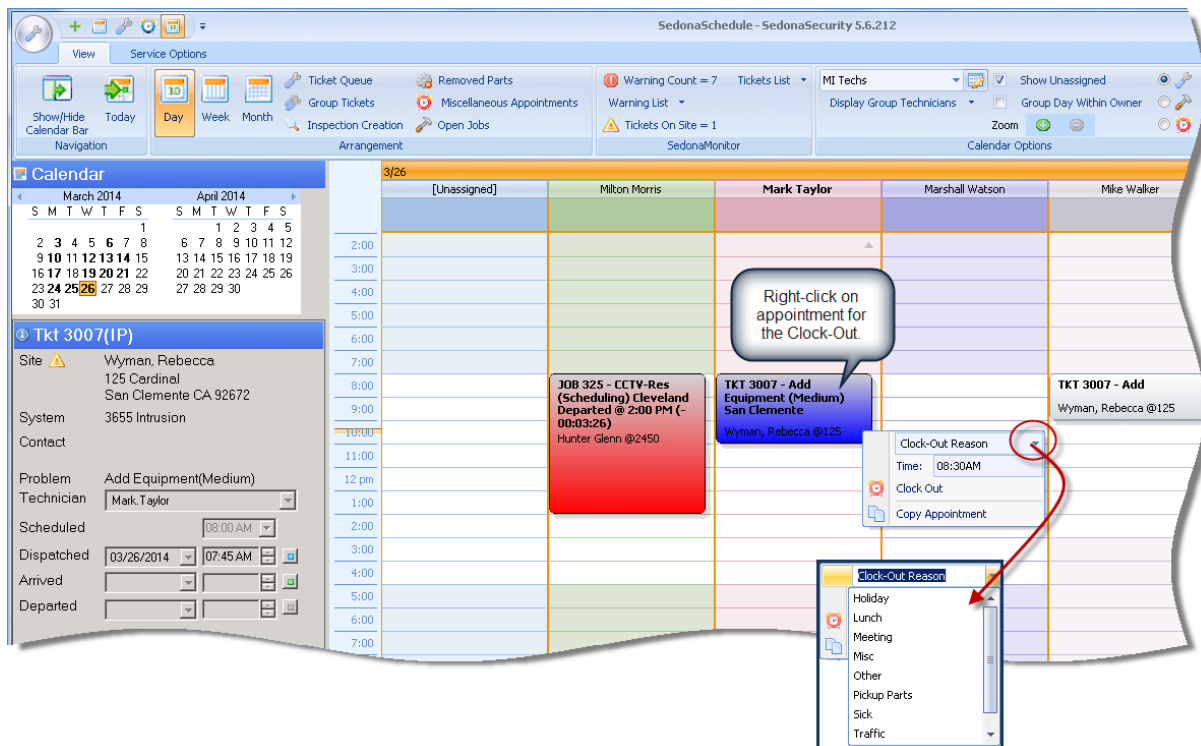Examples of how to use the Clock-In/Clock-Out feature is continued on the next page.

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Application Enhancements/Improvements (continued)

SedonaSchedule (continued)

Using the Clock-Out / Clock-In Feature - Tickets

To be able to Clock-Out on, there must be a dispatched time or arrived time already entered for the Technician Ticket Appointment.

1. From the Scheduling Board, click once on the appointment for which you want to Clock-Out, right-click and select the Clock-Out option.
2. In the Clock-Out Reason field, click on the drop-down arrow and select from the list. The list displayed in the drop-down list originate from the Miscellaneous Appointment Type setup.
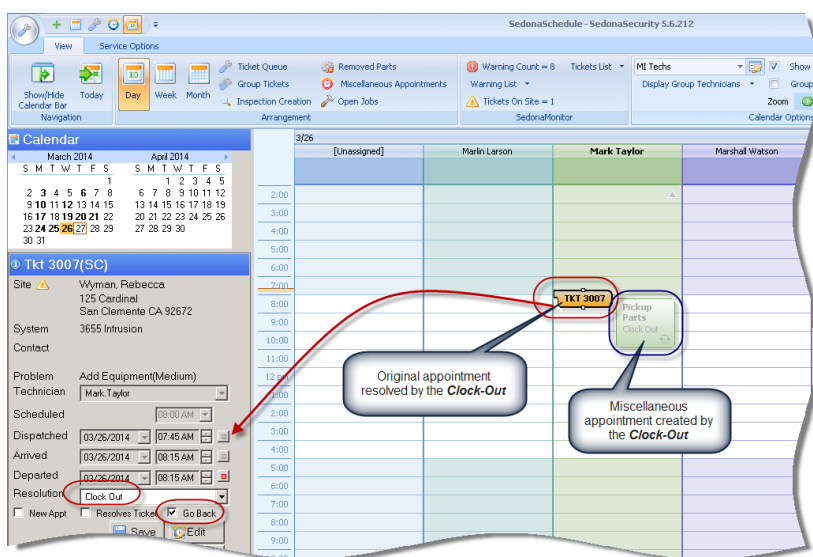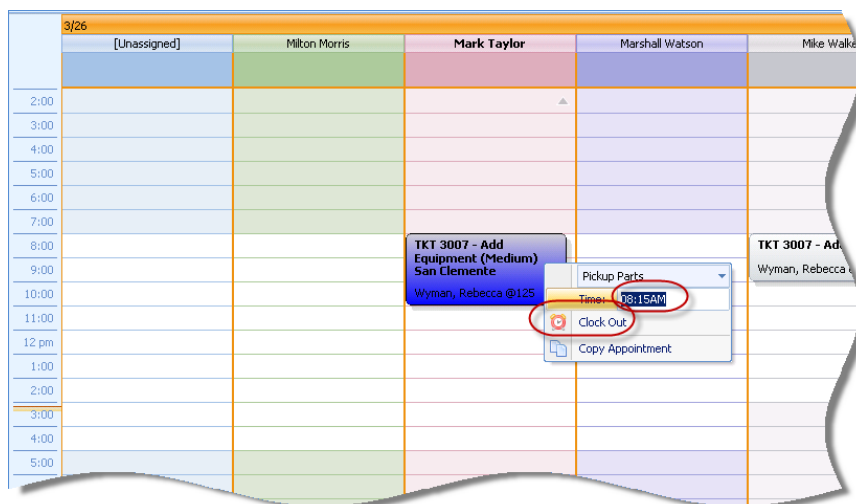
Application Enhancements/Improvements (continued)

SedonaSchedule *(continued)*

Using the Clock-Out / Clock-In Feature-Tickets (continued)

3. Press the **Tab** key on your keyboard which will advance the cursor to the *Time* button, then press the **Enter** on your keyboard which will move the cursor to the time field. Type in the clock-out time, then click on the **Clock Out** option.
   The clock-out time may be entered in twelve-hour format, or military time. *You must enter four digits*. If no "A" or "P" is entered after the time, military time is assumed. (Note that the "M" is not required for AM or PM.) If no time is entered, the clock-out time is assumed the current time on your computer (now).
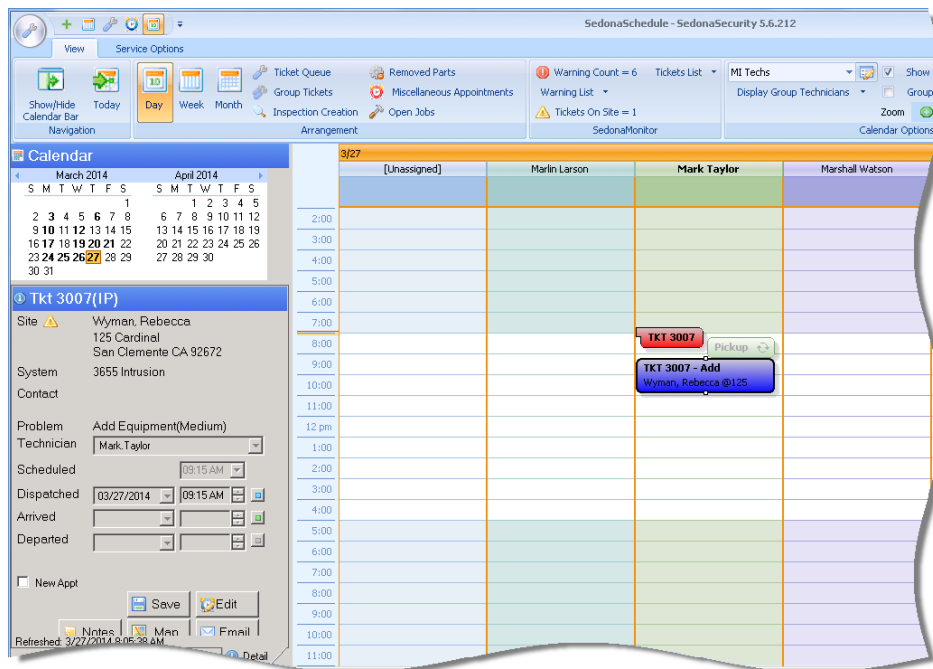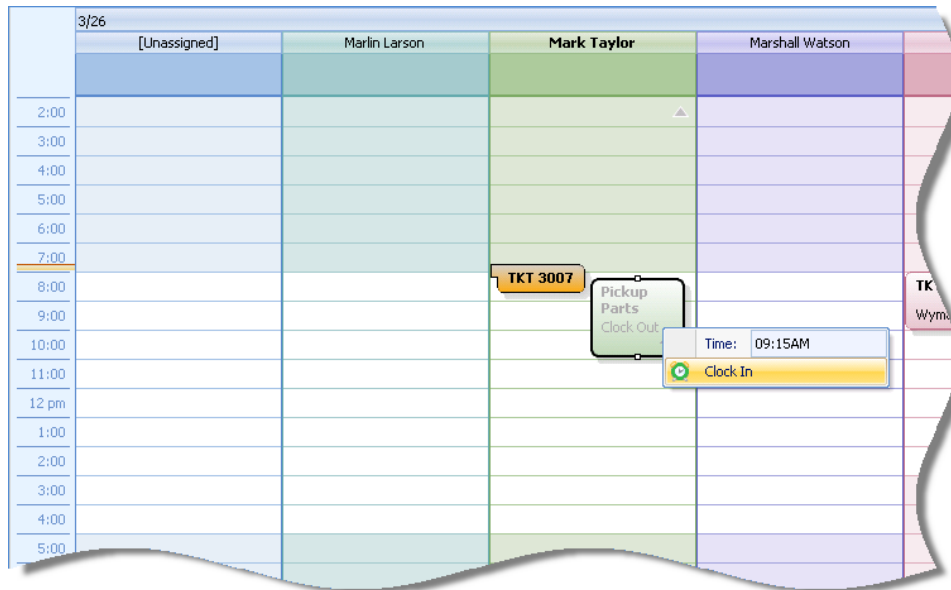
![SedonaOffice logo - The #1 Financial Software for Security Companies]

Application Enhancements/Improvements (continued)

SedonaSchedule *(continued)*

Using the Clock-Out / Clock-In Feature-Tickets (continued)

4. To Clock back In to the Technician Appointment, click once on the Miscellaneous "Clock-Out" appointment, right-click then press the *Tab* key, then the **Enter** key; the cursor should now be in the field to enter the Clock-In time. Enter the time, and then click on the **Clock-In** button.
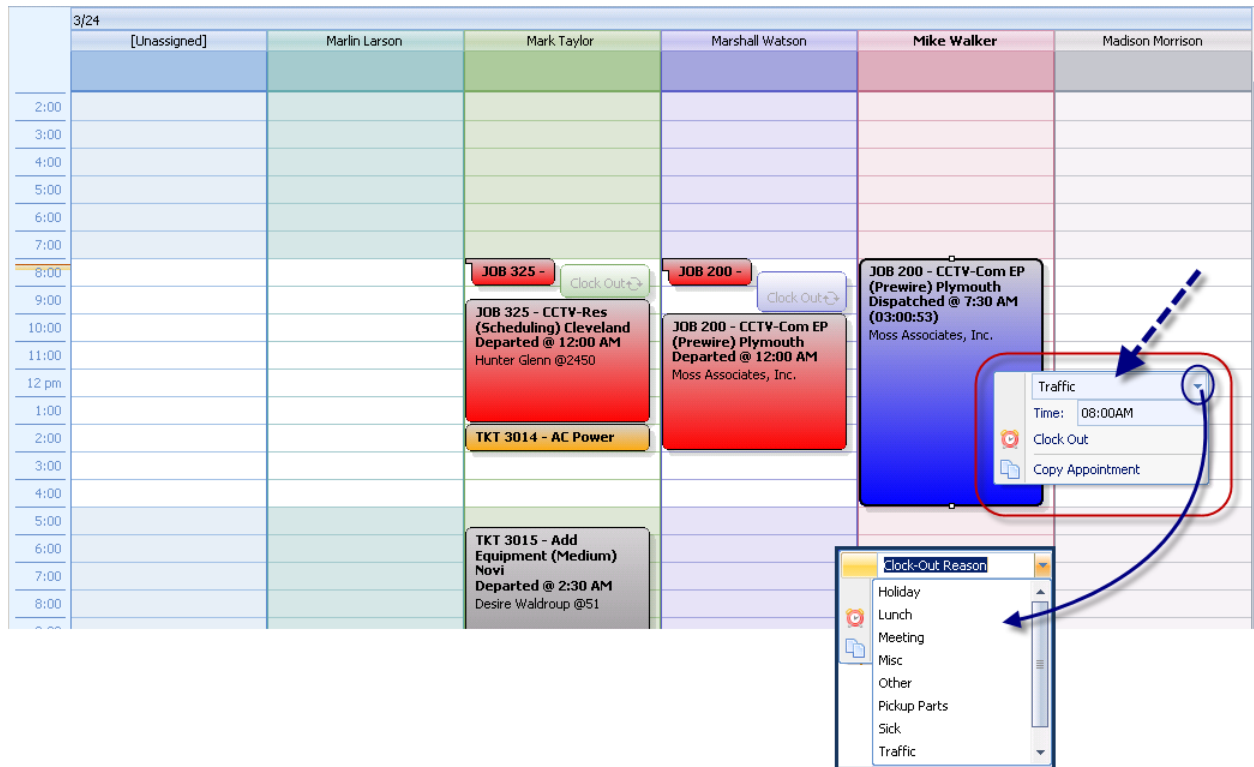
SedonaOffice®
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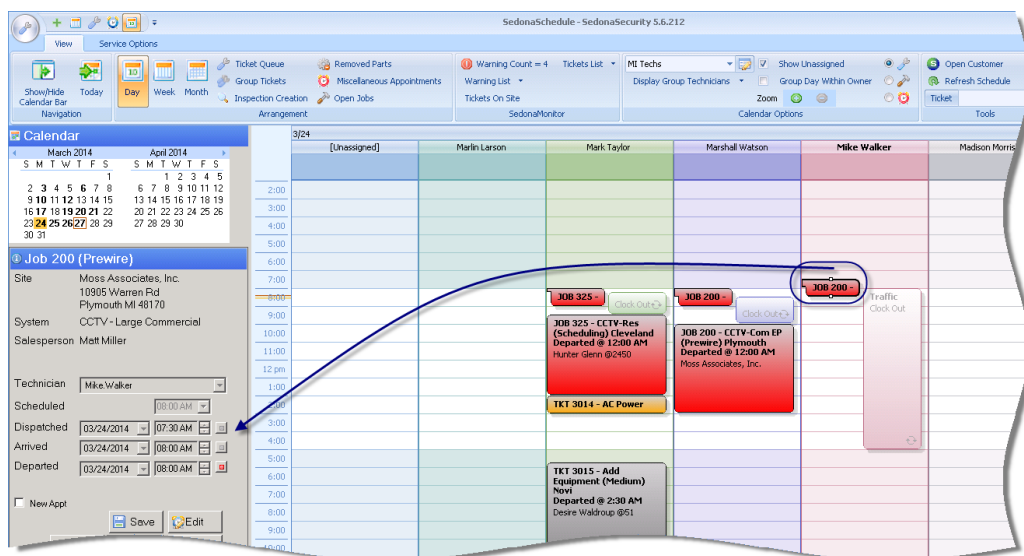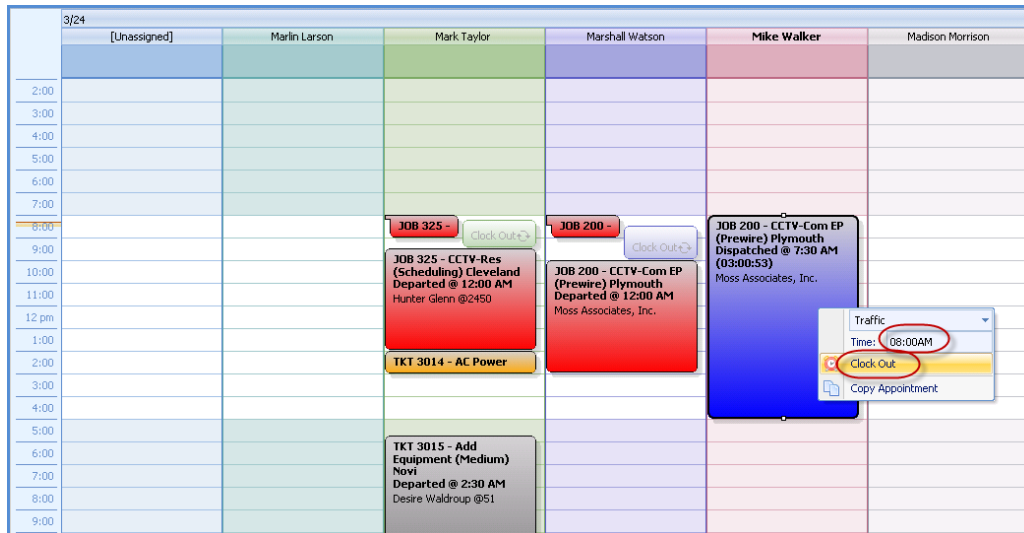
Application Enhancements/Improvements (continued)

SedonaSchedule *(continued)*

Using the Clock-Out / Clock-In Feature - Jobs

To be able to Clock-Out on, there must be a dispatched time or arrived time already entered for the Technician Job Appointment.

1. From the Scheduling Board, click once on the appointment for which you want to Clock-Out, right-click and select the Clock-Out option.
2. In the Clock-Out Reason field, click on the drop-down arrow and select from the list. The list displayed in the drop-down list originate from the Miscellaneous Appointment Type setup.
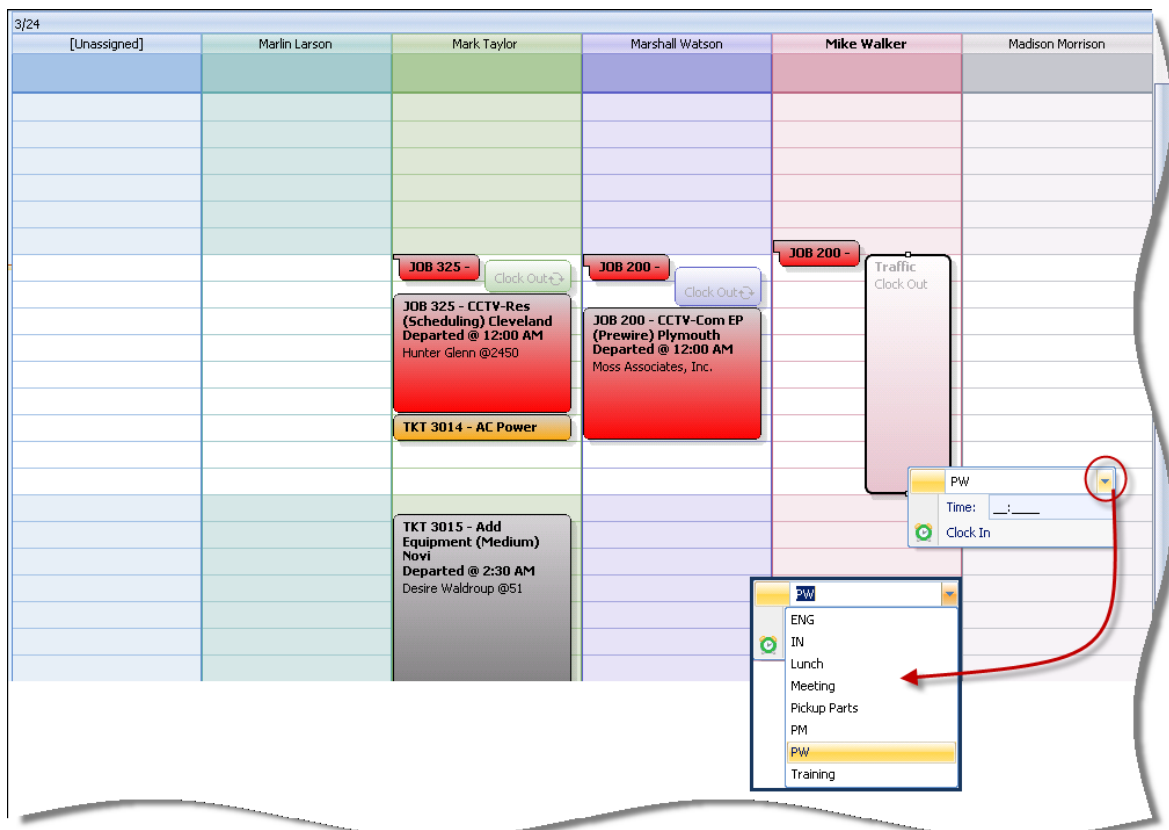
Application Enhancements/Improvements (continued)

SedonaSchedule *(continued)*

Using the Clock-Out / Clock-In Feature – Jobs (continued)

3. Press the **Tab** key on your keyboard which will advance the cursor to the *Time* button, then press the **Enter** on your keyboard which will move the cursor to the time field. Type in the clock-out time, then click on the **Clock Out** option.
The clock-out time may be entered in twelve-hour format, or military time. *You must enter four digits*. If no "A" or "P" is entered after the time, military time is assumed. (Note that the "M" is not required for AM or PM.) If no time is entered, the clock-out time is assumed the current time on your computer (now).

Application Enhancements/Improvements (continued)

SedonaSchedule *(continued)*

### *Using the Clock-Out / Clock-In Feature – Jobs (continued)*

4. To Clock back In to the Technician Job Appointment, click once on the Miscellaneous "Clock-Out" appointment then right-click. The first field is the Labor Task – if a Labor Task was selected when originally scheduling the Job Appointment, that Labor Task will default into the Labor Task field. If no Labor Task was selected when originally scheduling the Job Appointment, you must make a selection from the drop-down list. Next press the **Tab** key, then the **Enter** key; the cursor should now be in the field to enter the Clock-In time. Enter the time, and then click on the **Clock-In** button.

Application Enhancements/Improvements (continued)

SedonaSchedule *(continued)*

Using the Clock-Out / Clock-In Feature – Jobs (continued)
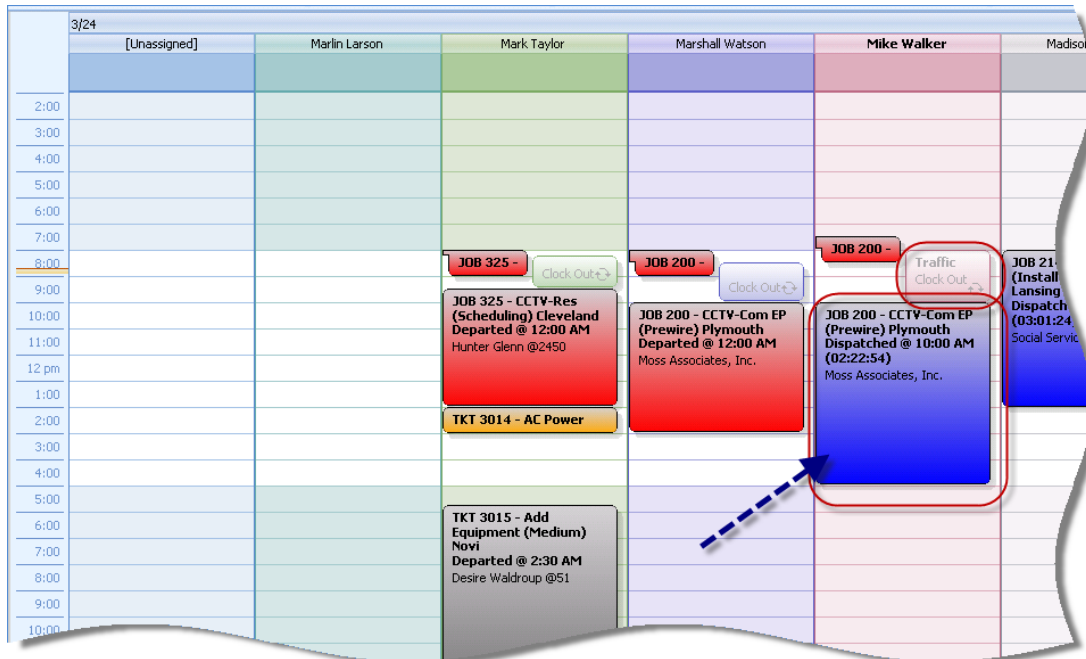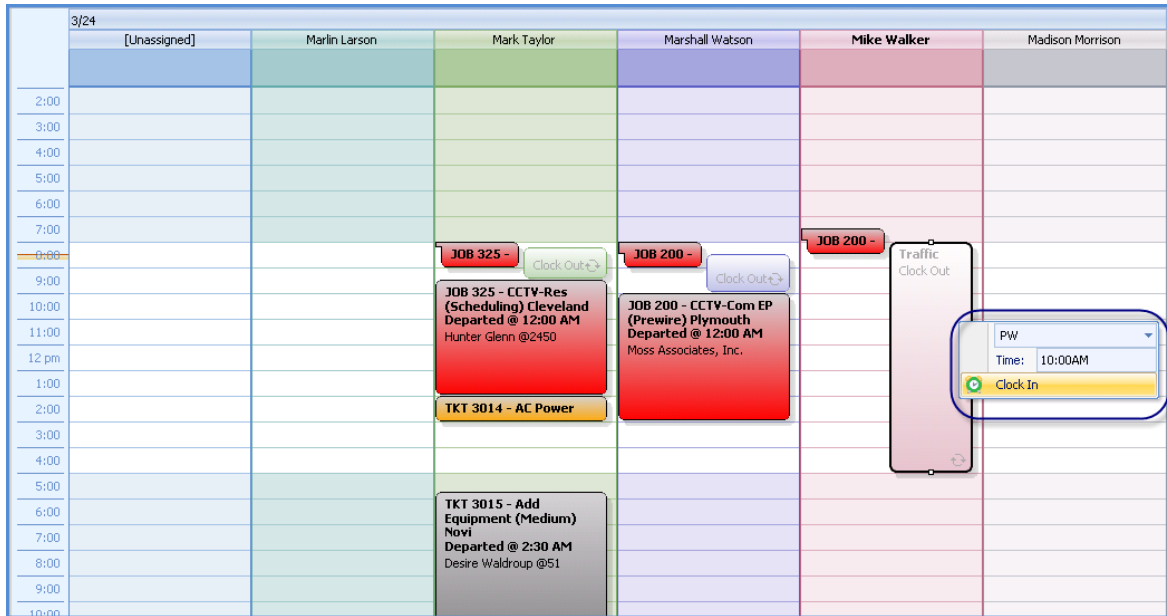
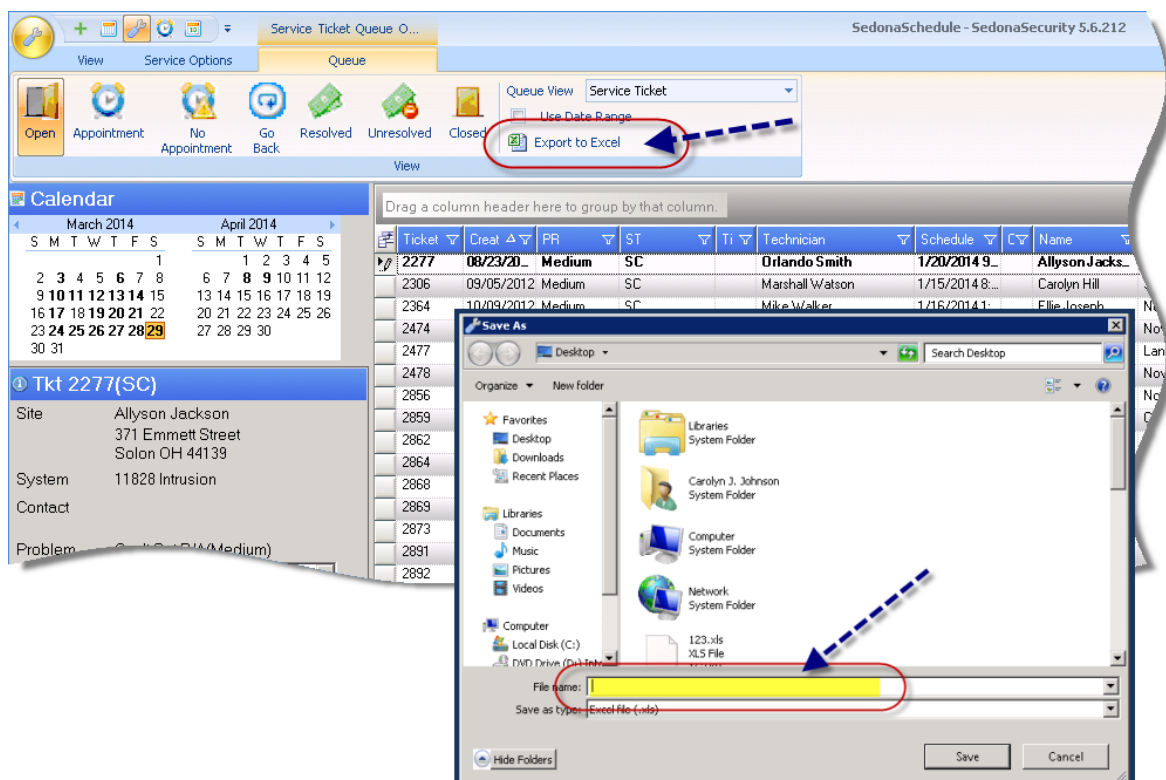*Application Enhancements/Improvements (continued)*

SedonaSchedule *(continued)*

Ticket Queue – Export to Excel

A new feature has been added to SedonaSchedule which allows you to export the current view of the Ticket Queue to an Excel file. Many SedonaOffice customers have requested the ability to print the Ticket Queue as you were able to do in the "Old" Service module, however due to increased number of fields now available, a printed report would look very "messy". Our solution was to provide the export to Excel function so as to allow the user to adjust the exported data as desired for printing.

The Export to Excel feature will work when in normal view of a Ticket Queue or when groupings have been added. Further, the exported data will contain only one header row, so you do not have to remove header rows from each page.

To use this new feature, navigate to the Ticket Queue and click on the *Export to Excel* button. The Windows "Save As" form will be displayed; enter a name for the file and select the save location, then click on the *Save* button.

Application Enhancements/Improvements (continued)

SedonaSchedule *(continued)*

Ticket Queue – Export to Excel (continued)

Below is an example of the Ticket Queue exported without groupings.

Below is an example of the Ticket Queue exported with groupings.

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Application Enhancements/Improvements (continued)

SedonaSetup

Employee Setup

When attempting to inactivate an Employee record for an Installer or Technician that is linked to one or more Display Groups within SedonaSchedule, a pop-up message will be displayed to the User asking if you wish to remove the Employee from all Display Groups.

Note 1: Before Inactivating an Employee that is in a display group in SedonaSchedule, make certain to move any appointments that are currently scheduled with the employee.

Note 2: If you click on the *No* button, the Technician will still appear on the SedonaSchedule board, but will not be present in the list of employees in the Display Group Edit. If you change your mind and want to remove that employee from the SedonaSchedule Board, you must reactivate the Employee record in SedonaSetup [and Save], then inactivate again to receive the message box again.
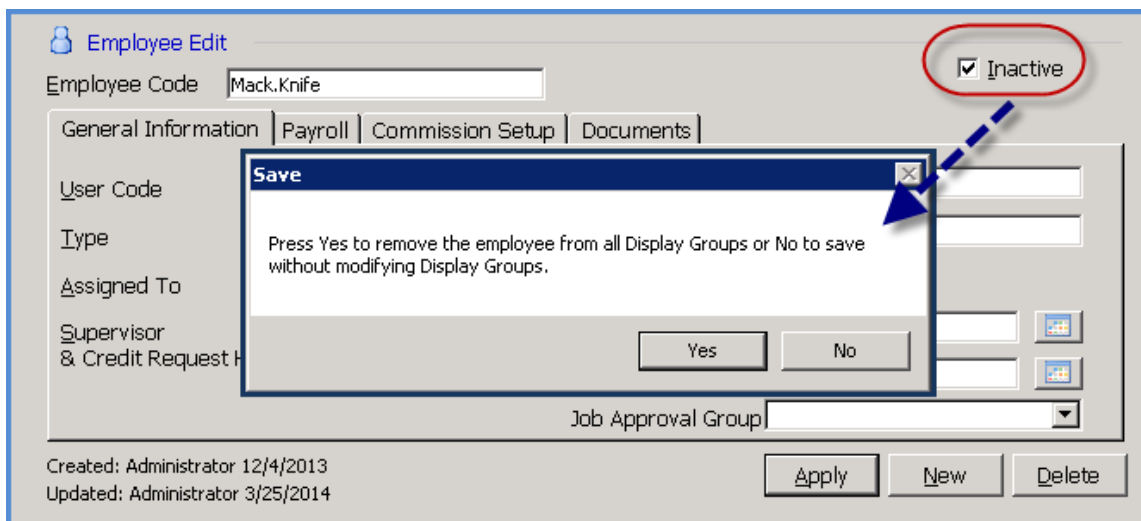
Application Enhancements/Improvements (continued)

SedonaSetup (continued)

User Group Setup

A new security option has been added to the SV (service) area of User Group Application Access. This new option is labeled "Override Parts Reconcile". If this security option is granted to a User's Group, if the parts on a ticket do not reconcile i.e. the number of parts required have not been issued to the ticket, the User will be able to close the ticket without forcing a reconciliation of the parts.
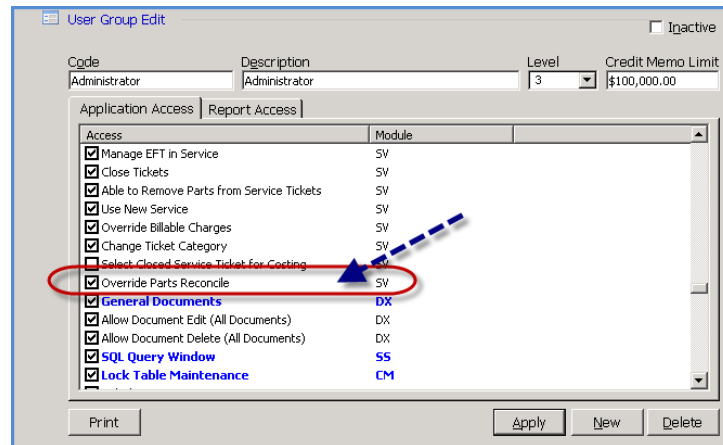
For Users that have been granted this new permission, when closing a ticket, if the parts do not reconcile, a message box will be displayed where they must type in the word "yes" to confirm they want to override the parts reconciliation and close out the ticket.
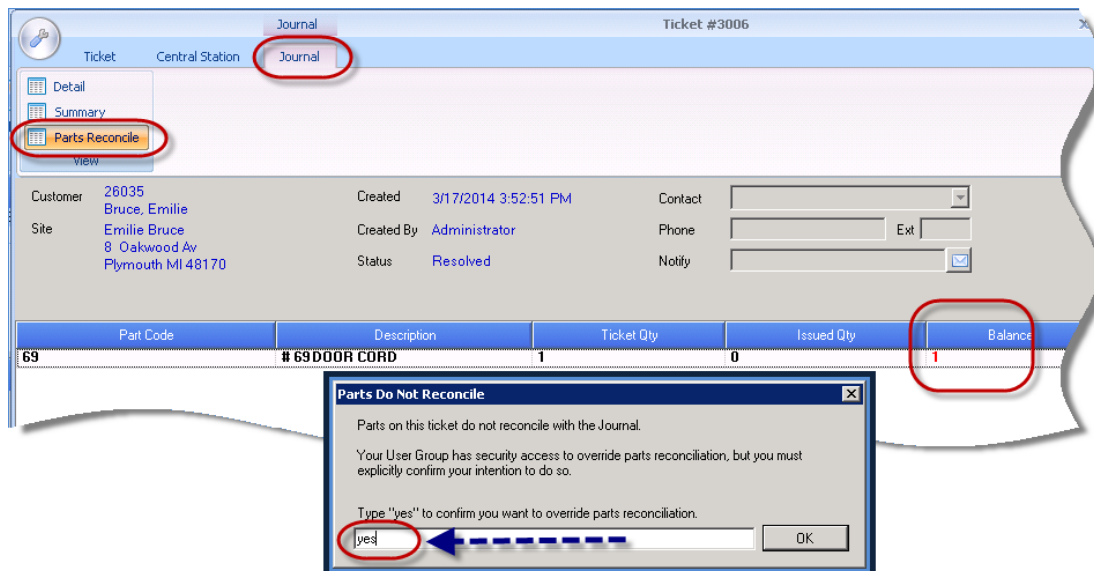
Application Corrections

General

- **User Licenses**: Corrected a reported issue; On some client workstations, upon exiting SedonaOffice, the User was not being released in SQL. Now, unused but held slots are now set to automatically clear in 5 minutes.

Management Summary Reports

- **Job Count by Salesperson Report**: Corrected a reported issue; The Job Count by Salesperson report was returning the results of the Prospect Count by Salesperson.

Accounts Payable

- **A/P Bills**: Corrected a reported issue; Clicking on Bills within the Accounts Payable module would cause a front-end error message and close the application. This problem was introduced as of 5.6.210 and has been corrected.
- **Printing A/P Checks**: Corrected a reported issue; When printing checks, the words "Base Currencys" was being displayed instead of the word "Dollars".

****Two Hundred Fifty Base Currencys and Zero Cents***

- **Inventory Receipts:** Corrected a reported issue; For entered Bills that were matched to an Inventory Receipt record, the Bill date on the Inventory Receipt record was being displayed as 12/30/1899 instead of the actual Bill Date entered.

Client Management

- **Subaccount RMR Split**: Corrected a reported issue; Application was not allowing the user to split RMR on recurring lines of Subaccounts.
- **Customer Lookup**: Corrected a reported issue; Using customer lookup, if you re-sort your search results by the customer number column and any customer number begins with a zero, the leading zero was removed and would not allow the User to open the customer.

Application Corrections (continued)

Job Management

- **Returning Parts**: Corrected a reported issue; When returning parts to stock from a Job, the application would occasionally changed the issued quantity on the Job Materials form to a negative quantity.
- **Job Imported from QuoteWerks**: Corrected a reported issue; The original quote from QuoteWerks was not being linked to the Job. This was an intermittent problem.
- **Direct Expense PO for Part with Package Quantity >1**: Corrected a reported issue; When receiving the direct expense purchase order, the cost recorded to the GL was multiplying the package cost times the number of individual pieces.
- **Customer Name on Job Banner**: Corrected a reported issue; The Customer Number instead of the Customer Name was being displayed in the Job banner.

SedonaSchedule

- **Overnight Appointment**: Corrected a reported issue; Attempting to schedule an appointment that spans from one day to the next would cause and error message and close SedonaService.
- **Re-Open PO on a Ticket**: Corrected a reported issue; When clicking on the Re-Open checkbox on a Purchase Order within a Ticket, the *Save* button was dimmed out.
- **Correcting Dispatch Times**: Corrected a reported issue; A User was attempting to correct a data entry error on the Ticket Dispatch form where the time was incorrectly entered as a future date. The application no longer allows a user to enter future dispatch dates, and was presenting an error message to the user and would not allow the editing of the dispatch time.
- **Viewing Invoice of a Closed Ticket**: Corrected a reported issue; After viewing the invoice of a closed ticket, the application was changing the ticket status to Resolved.

Report Manager

- **Commission Due Report**: Corrected a reported issue; An error message "Runtime Error 3704" was being displayed when trying to generate this report.