



SedonaOffice Release Notice

SedonaOffice

Version 5.6.214

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About this Document

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Overview

This document is being provided to explain enhancements, changes and application corrections made to the SedonaOffice application since the last released Version 5.6.213.

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Application Enhancements/Improvements

SedonaSchedule

Entering Ticket Notes

A change was made to the application when entering Notes within a Ticket. When the User presses the *Enter* key on their keyboard, this will force a carriage return to continue entering note text on the next line. Previously, pressing the *Enter* key would immediately save the note. This change was made to make the viewing of the saved text easier to read once saved.

Ticket Queue

A change has been made to the software that determines which tickets are displayed in the Ticket Queues. When clicking on the Ticket Queue, all Tickets that have not been closed will be displayed. Previously, the queue would look at the currently selected Display Group on the Schedule Board, and only show tickets that were linked to the Service Company to which the Technicians in the Display Group were associated. This caused problems with Tickets going “missing” if the Ticket was assigned to a Service Company to which no Technician was associated. This change was made as of 5.6.210, however was not completely documented in the release notice.

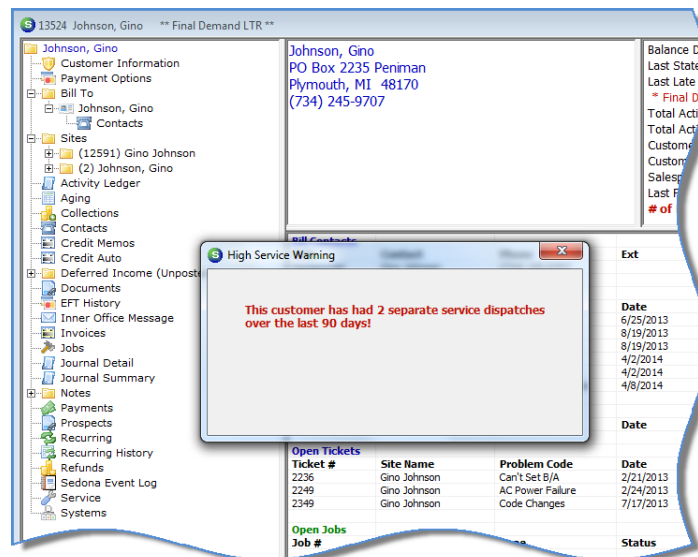
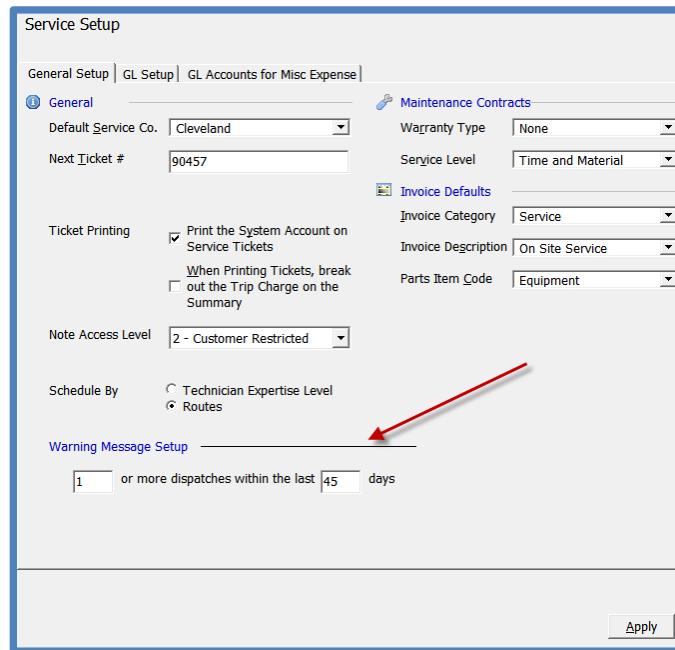
Many SedonaOffice customers who have multiple branch offices, prefer to view the Ticket queues by each branch location. For companies that do not have official “branch” setups in SedonaOffice, but want to split up the service department geographically to better manage Tickets, you may create multiple Service Companies to handle this. With the new rules of which Tickets are displayed in the Queue, you may filter on the Ticket’s Service Company to produce a more manageable list.

Application Enhancements/Improvements (continued)

SedonaSetup

Dispatch Warning Message Setup

A new area was added to the Service Setup Defaults in SedonaSetup which allows your company to control how frequently the new pop-up message for the number of recent dispatches is displayed. The settings entered affect the entire company.



Application Corrections

Accounts Payable

- **Editing a Purchase Order:** Corrected a reported issue; from the Purchase Order List within the Accounts Payable module, when highlighting a Purchase Order in the list and then clicking on the Edit button at the bottom of the PO List, an error message would be displayed and close the application. This would only occur on Purchase Order Numbers that contained an alpha character.

Client Management

- **Cancelling a Recurring Line:** Corrected a reported issue; when accessing the Recurring Lines via the tab at the top of the System record when in edit mode, a User was able to select and re-cancel a recurring line that was already marked for cancellation.
- **Non-Sequenced Collection Queues:** Corrected a reported issue; when removing a customer from a non-sequenced collection queue, the collection status (in the database) was not properly being updated. This resulted in a Collection Status being displayed in a Ticket.

General Ledger

- **Royalties & Commissions:** Corrected a reported issue; the expected results were not being shown when selecting a certain combination of options on the Criteria form.

Job Management

- **Kits:** Corrected a reported issue; when a part on the Job Materials list is setup as a Kit and flagged as “customer equipment” in part setup, when closing the Job, an error message is being presented and the Kit is not transferring to the System Equipment list of the Customer Explorer.
- **Job Purchase Orders for Parts:** Corrected a reported issue; When creating a Purchase Order within a Job and there is a quantity greater than 1 of a given part, the PO was creating a line in the PO for each multiple.
- **Labor Units Recorded to Job:** Corrected a reported issue; when entering commissions via the Payroll Timesheet method, the application was incrementing the number of labor units used on the Job.

Application Corrections (continued)

SedonaDocs

- **Access to Documents:** Corrected a reported issue; Error message “3265” received when attempting to view a document, delete a document or edit document properties within the Customer Explorer.

SedonaSchedule

- **“Other” Charges on a Ticket:** Corrected a reported issue; When a Ticket is created and the default Service Level contains an automatically added “Other” charge, if the User deleted the Other charge, then created the invoice, the invoice was including the Other charge and was also reappearing on the Other form of the Ticket after invoicing.
- **Job Appointments:** Corrected a reported issue; Error message was received a attempting to schedule a Job Appointment on the first day of the month.
- **Tickets assigned to the “Unassigned” Tech:** Corrected a reported issue; Unable to drag an appointment from the Unassigned Tech to a regular Technician on the Schedule Board.
- **Purchase Orders Created within a Ticket:** Corrected a reported issue; When creating a PO within a Ticket, the PO was in view only mode; User was unable to add or change any information on the PO.
- **Service Coordinator:** Corrected a reported issue; When clicking on the drop-down arrow within the Service Coordinator field of the Ticket, inactive employee names were being listed.
- **Multiple Dispatched Appointments on a Ticket:** Corrected a reported issue; if multiple Technician Appointments have been dispatched for a Ticket, the User was unable to Invoice/Close without first going into each appointment dispatch form and changing from GI Back to Resolved.