



The #1 Financial Software for Security Companies

Release Notice

Version 5.7.89/90/91

Release Date: January 19, 2018

www.SedonaOffice.com | (440) 247-5602

PERENNIAL SOFTWARE

Table of Contents

About this Document.....	8
Overview	8
Application Enhancements/Improvements	9
Accounts Payable.....	9
ADI Integration.....	9
Bills	10
Credits	12
Purchase Orders.....	13
Purchase Order Receipts	16
Vendor – Add A New Vendor.....	17
Vendor Return	18
Vendor Search.....	19
Accounts Receivable.....	22
Auto Processing Non-Recurring Invoices	22
BFIS Export	24
Cycle Invoice Purchase Order Numbers.....	25
Credit Memo Reversals	26
Invoice Printing Preferences.....	27
Tax Exempt Line Items.....	28
Payment Processing.....	29
Statements.....	30
Application Menu.....	31

Table of Contents

Client Management	33
Customer Equipment List	33
Local Zone	33
Customer Search	34
Simple View	35
Advanced View	37
Central Station Integration	42
Setup	43
Integration Setup	46
Creating a New Central Station Account	48
Attaching a SedonaOffice Record To An Existing Central Station Account	56
View an Existing CMS Record Within SedonaOffice	57
General Ledger	60
Journal Entries	60
Jobs	60
Bill TOs – 3 rd Party Addresses	60
Change Orders	62
Change Order Requests	62
Setup	63
Creating a Change Order Request	66
Editing the Change Order Request	90
Deleting Change Order Requests	91
Submitting the Change Order Request	92
Change Order Request List	93

Table of Contents

Withdrawing a Change Order Request.....	94
Approve or Reject A Change Order Request.....	100
Closing A Job with Open Appointments	102
Install Items.....	103
Materials List.....	104
Local Zone	104
Tax Exempt Line	105
Job Tickets.....	106
Recurring.....	107
Point of Sale	108
Inventory.....	108
Invoice.....	109
Tax Exempt Line Item.....	109
SedonaDocs	109
Number of Documents.....	109
SedonaSchedule	110
Service Tickets	110
Go Back Status	110
Purchase Orders.....	111
Resolution Notes.....	112
Ticket Queue Field Chooser.....	113
SedonaSetup.....	114
Tax Tables	114
Tax Exempt Line Items.....	114
Usergroups.....	117
Accounts Receivable	117

Application Corrections	118
Accounts Payable.....	118
ADI Integration.....	118
AP Query Builder.....	118
Bills	118
Checks	119
Purchase Orders.....	119
Purchase Order Receipts	119
Vendor Return	120
Accounts Receivable.....	120
Credit Requests.....	120
Cycle Invoicing	120
Credits	120
Deferred Income.....	120
Invoice Forms.....	120
SedonaEmail	121
Client Management	121
Bill To.....	121
Customer Query Builder	121
Customer Search	121
EFT.....	121
Inspections.....	121
Sites.....	121
Systems	123
Extended User Defined Fields.....	123

Table of Contents

Inventory	123
Stock Adjustments	123
Transfers	123
Jobs	123
Appointments	123
Change Orders	123
Invoices	123
Issues/Returns	124
Materials List.....	124
Recurring.....	124
Timesheets.....	124
WeSuite.....	124
Point of Sale	125
Reports	126
Commission Due Report*	126
Deferred Income Audit.....	126
Deferred Income Creation.....	126
Deferred Income Distribution	126
Deferred Income Revenue Summary Audit*	126
Deferred Revenue Summary Audit	126
Income Statement	126
SedonaSchedule	127
Batch Billing	127
Invoices	127
Service Tickets	127

SedonaSetup.....	127
Branches	127
Usergroups.....	127
Windows 10 Users.....	128
Use of Mouse Scroll Wheel	128
Compatibility.....	129

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 enhancements and corrections made in the release and is to be used for reference purposes only.

SedonaOffice reserves the right to modify the SedonaOffice product described in this document at any time and without notice. Information contained in this document is subject to change without notice. Companies, names and data used in examples herein are fictitious unless otherwise noted. In no event shall SedonaOffice be held liable for any incidental, indirect, special, or consequential damages arising from or related to this guide or the information contained herein. The information contained in this document is the property of SedonaOffice.

This document may be updated periodically; please visit our website at www.sedonaoffice.com for the most current version. Copyright 2008, 2009, 2010, 2011, 2012, 2013, 2014, 2015, 2016, 2017, 2018

Overview

This document is being provided to explain the changes made to the SedonaOffice application since Version 5.7.60. This is an intermediate version update that contains application corrections and enhancements. Version 90 consists of all changes made in version 5.7.89 plus one EFT correction made to 5.7.89. Version 91 consists of all changes made in versions 5.7.89 and 5.7.91 plus one correction made to SedonaEmail.

Application Enhancements/Improvements

Accounts Payable

ADI Integration

Purchase Orders

When a part kit is added to a purchase order, and the user clicks on “Get Parts”, a message will be displayed noting any of the kit components have not been setup as individual parts within SedonaOffice.

New Purchase Order

Vendor: ADI Category: SVC T&M

Purchase Order

ADI Status: PO Number: 4057 Branch: ADI Integration Warehouse: ADI Integration

231 West 42nd St
New York, New York 10024
Phone: (800) 555-4321
Fax:

Ship To: ADI Global Distribution
C/o Margaret Enzien
263 Old Country Road
Melville, NY 11747

Tracing #: Order Date: 11/24/2017 Acknowledged

Ship Date: Ship Method: FedEx Ground

Parts Due Date: Job Number:

Parts: 312.99 Kit Parts: Expense: 0.00 Documents

Part	Description	Vendor Part	Vendor Desc	Pkg Qty	Quantity	Cost	Amount	PurchaseOrderPt	Rcvd	Std Cost	BO	Kit
6160	ALPHA ENGLISH KEY	6160		1	1	84.04	84.04		0			V1288PT-KT1

Adding Kit Parts

The following kit(s) contain parts that are not in the parts inventory!
(V1288PT-KT1)
Please resolve this issue before saving the Purchase Order.

OK

Memo: This memo must appear on all ADI POs it contains important information regarding our arrangements with ADI

Total Cost: 312.99
Received Cost:

Get Kit Parts

Bills

Manual Override of GST Tax Calculation For Parts

Customers that need to record GST on their bills now have a Manual GST override button to enter the exact amount of GST required for parts. After selecting which parts are subject to GST, the user may enter the amount of GST directly into the Parts GST box.

The screenshot displays the 'Bills' entry window. At the top, the 'Vendor' is 'Tri-Ed' and the 'Category' is 'D-G&A'. The 'Vendor Bill for PO# 68' is shown. The 'Vendor Address' is 'Tri-Ed, P.O. Box 402433, Atlanta, GA 30384'. The 'Reference #' is '9772' and the 'Branch' is 'MI'. The 'Terms' are 'Due On Receipt' and the 'Amount' is '2086.34'. The 'GST (10.0%)' is '0.00'. A blue box highlights the 'Manual GST' checkbox, which is checked. A blue arrow points from this checkbox to the 'Parts GST' field, which contains '20.87'. The 'Bill Date' is '11/5/2017' and the 'Payment Due' is '11/5/2017'. The 'Eligible for Discount Amt' is '2086.34' and the 'Costing' is '1760'. The 'Parts List' table is shown below, with columns for 'Part Code', 'Description', 'Vendor Part', 'QTY', 'Cost', 'Amount', and 'GST'. The table contains three rows of data. The 'Total' is '2086.34' and the 'Balance Due' is '2086.34'.

Part Code	Description	Vendor Part	QTY	Cost	Amount	GST
N1000IIX	NORTHERN ACCESS CONTROL PANEL	NC-N1000IIX	1	1812.26	1812.26	<input checked="" type="checkbox"/>
CAM9710	PIEZOELECTRIC EXIT SWITCH	CM-9710	1	74.08	74.08	<input checked="" type="checkbox"/>
PR-MINI	PR-MINI-PROX CARD READER PROX	PR-MINI	1	200.00	200.00	<input checked="" type="checkbox"/>

Total 2086.34
Balance Due 2086.34

Negative Expense Line Items

Users may now record negative quantities on the expense lines of bills to record discounts. This would be done when the vendor was not setup to automatically record a discount for early payment or where the discount was greater or less than the discount for early payment. A negative quantity is entered with a positive dollar amount to create the entry.

Bills

Vendor: Tri-Ed
Address: P.O. Box 402433
Atlanta, GA 30384

Category: D-G&A

Reference #: 4378-5
Branch: MI
Warehouse: Main-MI

Terms: Due On Receipt
Amount: \$64.00

Bill Date: 11/5/2017
Payment Due: 11/5/2017

Eligible for Discount Amt: \$0.00
Costing:

Parts: 84.00 Expense: -8.40 Documents: ☒ Show Branches ☒ Show Job Cost ☐ Single Expense Line

GL Account	Description	Qty	Rate	Amount	Branch	Category	Job	Type	Pass Item
810180	Discounts Taken	-1	8.40	-8.40	MI	D-G&A		O	

Memo:

Total: 75.60
Balance Due: 75.60

Copy Expenses Apply Save Close

Credits

Manual Override of GST Tax Calculation For Parts

Customers that need to record GST on their credits now have a Manual GST override button to enter the exact amount of GST required for parts. After selecting which parts are subject to GST, the user may enter the amount of GST directly into the Parts GST box.

Vendor Credit

Vendor: **Tri-Ed**
Address: **P.O. Box 402433
Atlanta, GA 30384**

Category: **D-GSA**

Reference #: **9772** Branch: **MI**

Amount: **248.00** GST (10.0%): **20.81** ☒ Manual GST

Credit Date: **12/27/2017**

Costing: **1712** Sea Yasoos: **20.81**

Parts: **208.00** Expense: **40.00** Documents: **20.81**

Parts are only loaded in from Inventory Receipts and Returns.

Part Code	Description	Vendor Part	QTY	Cost	Amount	GST
028225-32	6211U54 STRIKE	0456550	1	208.00	208.00	<input checked="" type="checkbox"/>

Memo: Returned Receipt: Received on: 12/12/2017

Total: **268.81**
Balance Due: **268.81**

Copy Expenses Apply Save Close

Printing Credits

Printing of vendor credits will auto select to A4 paper if the country is not set to US or CA in the Sedona Modules setup table.

Purchase Orders

Editing Acknowledged POs

Customers that have chosen to use the Acknowledge POs feature must now give users permission to edit the already acknowledged POs in the Usergroup table. If a user does not have the permission to edit an acknowledged PO, editing of the PO will not be possible.

Sedona Office Setup (SedonaSecurity)

File Find Find Next View Tools Help

Sedona Setup

Description	Area
Warranty Types	SV
Warehouses	IN
Vendors	AP
Vendor Types	AP
Users	OP
User Groups	OP
User Defined Table4	SM
User Defined Table3	SM
User Defined Table2	SM
User Defined Table1	SM
User Defined Setup	SM
UL Grade	CS
Type Of Customer	CM
Transmission Format	CS
Terms	AP
Terms	AR
Technicians	SV
Tax Tables	AR
Tax Groups	AR
Tax Agency	AP
System Types	CM
Status	SM
Statement Rules	AR
Signal Types	CS
Shipping Methods	AP
Setup Processing	AP
Setup Processing	AR
Setup Processing	JM
Setup Defaults	SV
Service Ticket Message	SV
Service Levels	SV
Service Companies	SV
Sedona Modules	OP
Scheduling and Appointments	SV
Sales Resolution Codes	SM
Sales Managers	SM

User Groups

☐ User Groups

Group	Description	Level	Credit Limit
Accounting Clerk	Accounting Clerk	2	\$5,000.00
Admin	Admin	3	\$100,000.00
Admin Assistant	Admin Assistant	1	\$100.00
Administrator	Administrator	3	\$10,000.00
AP Query Only	AP Query Only	1	\$0.00
AR-Deb & Ruth	AR-Deb & Ruth	2	\$500.00
Data Entry Job	Data Entry Job	1	\$1.00
Dealers	Dealers	2	\$0.00
Dealers View	Dealers View with Notes	1	\$0.00

☐ Include Inactive

☒ User Group Edit ☐ Inactive

Code	Description	Level	Credit Memo Limit
Administrator	Administrator	3	\$10,000,000.00

Application Access | Report Access

Access	Module
<input checked="" type="checkbox"/> ADI Integration	AP
<input checked="" type="checkbox"/> Vendor Custom Fields	AP
<input checked="" type="checkbox"/> Vendor Documents	AP
<input type="checkbox"/> View Only Access for Checks	AP
<input checked="" type="checkbox"/> Edit Vendor Notes	AP
<input checked="" type="checkbox"/> Delete Vendor Notes	AP
<input checked="" type="checkbox"/> Access to Secure Vendors	AP
<input checked="" type="checkbox"/> Override Expense Type	AP
<input type="checkbox"/> Read Only Vendor Access	AP
<input type="checkbox"/> Hide Vendor Social Security No	AP
<input checked="" type="checkbox"/> Edit Costs on Purchase Orders	AP
<input checked="" type="checkbox"/> Edit Acknowledged PO	AP
<input checked="" type="checkbox"/> Inventory	IN

Print Apply New Delete

Job Phase Codes

Job phase codes can now be defined for parts ordered on a Purchase Order that is created from Accounts Payable.

New Purchase Order

Vendor: Tri-Ed Category: D-G&A

Print Now
Direct Expense

Purchase Order

Tri-Ed
P.O. Box 402433
Atlanta, Georgia 30384
Phone: (800) 366-4472
Fax:

Ship To: SedonaSecurity
45185 Joy Road
Canton, MI 48187

Drop Ship

PO Number: 4065 Branch: MI

Tracing #: Order Date: 11/24/2017 Acknowledged

Ship Date: Ship Method:

Parts Dye Date: Job Number: 1743 Job Phase Code: Phase 01

Tequila Mockingbird

Select from All Parts

Parts List

Part	Description	Vendor Part	Vendor Desc	Pkg Qty	Quantity	Cost	Amount	Rcvd	Std Cost	BO
302-AW	302-AW HEAT DETECT	302-AW	302-AW HEAT DETECT	1	1	14.88	14.88		14.8800	<input type="checkbox"/>
2W7AB	BK-2W7AB SMOKE DETE	BK-2W7AB	BK-2W7AB SMOKE DETE	1	1	30.80	30.80		30.8000	<input type="checkbox"/>
5077	L200 HEAT DETECTOR I	5077	L200 HEAT DETECTOR I	1	1	12.00	12.00		12.0000	<input type="checkbox"/>
*										<input type="checkbox"/>

Memg:

Total Cost: \$57.68
Received Cost: \$0.00

Apply OK Cancel

Negative Quantities

Negative quantities may now be entered on the expense line tab to record discounts that have not already been setup on the vendor for early payment.

Purchase Order 4064

Vendor: Perennial Software Category: Admin G & A

Purchase Order

Perennial Software
8401 Chagrin Blvd. - Suite 15B
Chagrin Falls, Ohio 44023
Phone: (440) 247-5602
Fax: (920) 441-9966

PO Number: 4064 Branch: MI

Tracking #: Order Date: 10/26/2017

Ship To: SedonaSecurity
45185 Joy Road
Canton, MI 48187

Ship Date: Ship Method:

Parts Due Date: Costing:

Print Now
Direct Expense

Parts 0.00 Expense 895.00 Documents

General Ledger						Job Costing			
GL Account	Description	Qty	Rate	Amount	Rcvd	Cost	Category	Type	
620320	2018 Users Conference	1	995.00	995.00	0	0.00	Admin G & A	O	
620120	Discount Given	-1	100.00	-100.00	0	0.00	Admin G & A	O	

Created By: Administrator 11/24/2017 4:31:34 PM
Edited By: Administrator 11/24/2017 4:31:34 PM

Total Cost: 895.00
Received Cost: 0.00

OK Cancel

Purchase Order Receipts

When a reference number has been previously used on a vendor, SedonaOffice will now bring this to the user's attention and ask if they want to reuse the number.

The screenshot shows the 'Parts Receipt' window in SedonaOffice. The window has a header section with fields for Vendor (Tri-Ed), Category (D-G&A), and checkboxes for 'Close - No Bill Expected' and 'Create Bill From Receipt'. Below this is a section for PO# 48, with fields for Reference # (111), Branch (MT), Warehouse (Main-MT), Receive Date (11/24/2017), and Received By. There are also radio buttons for 'Direct Expense', 'Receive to Warehouse', and 'Receive & Issue Immediately', and a checkbox for 'View Serial/Lot Numbers'. A table titled 'Parts List' is visible, showing one row for 'EB-1 EXIT BUTTON' with a quantity of 1 and a cost of 56.5900. A warning dialog box is displayed in the center, asking 'The Reference number has already been used for this vendor. Are you sure you want to reuse this reference?' with 'Yes' and 'No' buttons. At the bottom, there is a 'Memo' field, a 'Print Stock Labels' button, and summary fields for 'Part Total' (56.59) and 'Expense Total' (0.00), along with 'Apply', 'Save', and 'Close' buttons.

Vendor: Tri-Ed
Category: D-G&A
Close - No Bill Expected
Create Bill From Receipt

PO# 48
Tri-Ed
P.O. Box 402433
Atlanta, GA 30384

Reference #: 111
Branch: MT
Warehouse: Main-MT
Receive Date: 11/24/2017
Received By:
Other Costing:
Direct Expense
Receive to Warehouse
Receive & Issue Immediately
View Serial/Lot Numbers

Part Code	Description	Vendor Part	Pkg_Qty	Quantity	Cost	Amount	Serial No	Lot No	Stand Cost
EB-1	EB-1 EXIT BUTTON	EB-1	1	1	56.5900	56.59			56.5900

SedonaOffice
The Reference number has already been used for this vendor.
Are you sure you want to reuse this reference?
Yes No

Memo:
Part Total: 56.59
Expense Total: 0.00
Print Stock Labels
Apply Save Close

Vendor – Add A New Vendor

Vendors are now added through the new Vendor Search utility by pressing the “New Vendor” button. Full details on this new search utility may be found under “Vendor Search” in the enhancement section below.

The screenshot shows the 'SedonaOffice Search - SedonaSecurity' window. It has two tabs: 'AR Search' and 'AP Search'. The 'AP Search' tab is active. Below the tabs is the 'AP Search Criteria' section, which includes 'Add Criteria' and 'Clear Criteria' buttons, a 'Search' button, and a search input area. The search criteria are set to 'Vendor' with a search term of '2'. There are checkboxes for 'Name' and 'Code' (both checked), and an 'Include Inactive' checkbox (unchecked). Below the search criteria is the 'AP Search Results' section, which displays a table of search results. The table has columns for Vendor, Business Name, Branch, Vendor Type, and Current Balance. The results show several vendors, including Perennial Software, MI Treasurer, ADI, OH Comptroller, A&A Office Systems Inc, A+ Cleaning Services, and Abc Disposal Service, Inc. At the bottom of the window, there is a status bar showing 'Found 100... results' and buttons for 'New Vendor', 'Select', and 'Close'.

Vendor	Business Name	Branch	Vendor Type	Current Balance
Perennial Software	Perennial Software	MI	Outside Services	0.00
MI Treasurer	Michigan State Treasurer	MI	Sales Tax Agency	0.00
ADI	ADI	MI	Parts Supplier	12,936.80
OH Comptroller	State of Ohio Comptroller	OH	Sales Tax Agency	0.00
A&A Office Systems Inc	A&A Office Systems Inc	MI	Office Supplies	2,578.00
A+ Cleaning Services	A+ Cleaning Services	MI	Outside Services	37.72
Abc Disposal Service, Inc	Abc Disposal Service, Inc	MI	Outside Services	-659.25
Ask Disposal	Ask Disposal	MI	Outside Services	123.60

Vendor Return

When a reference number has been previously used on a vendor, SedonaOffice will now bring this to the user's attention and ask if they want to reuse the number.

The screenshot shows the 'Parts Return' window in SedonaOffice. The window has a header bar with 'Parts Return' and a 'Close - No Credit' button. Below the header, there are fields for 'Vendor' (Tri-Ed), 'Category' (Jobs Add/Upgrade Com), 'Reference #' (111), 'Branch' (MI), 'Warehouse' (Main-MI), 'Receive Date' (11/24/2017), 'Received By', 'Job Costing', and 'Direct Expense' (Return from Warehouse). A 'View Serial/Lot Numbers' checkbox is checked. Below these fields is a 'Parts List' table with columns: Part Code, Description, Vendor Part, Plg_Qty, Quantity, Cost, Amount, Serial No, Lot No, and Stand Cost. The table contains one row for Part Code 029701-32, Description 6112U5412VDC STRIKE 12V, Vendor Part 029701-32, Plg_Qty 1, Quantity 1, Cost 246.0000, Amount 246.00, and Stand Cost 246.0000. A 'Memo' field is at the bottom left. At the bottom right, there are 'Part Total' (246.00) and 'Expense Total' (0.00) fields. At the very bottom, there are 'Print Stock Labels', 'Apply', 'Save', and 'Close' buttons. A warning dialog box is open in the center of the window, titled 'SedonaOffice', with a question mark icon and the text: 'The Reference number has already been used for this vendor. Are you sure you want to reuse this reference?'. The dialog box has 'Yes' and 'No' buttons.

Vendor: Tri-Ed
Category: Jobs Add/Upgrade Com
Reference #: 111
Branch: MI
Warehouse: Main-MI
Receive Date: 11/24/2017
Received By:
Job Costing:
Direct Expense: Return from Warehouse
View Serial/Lot Numbers: ☒

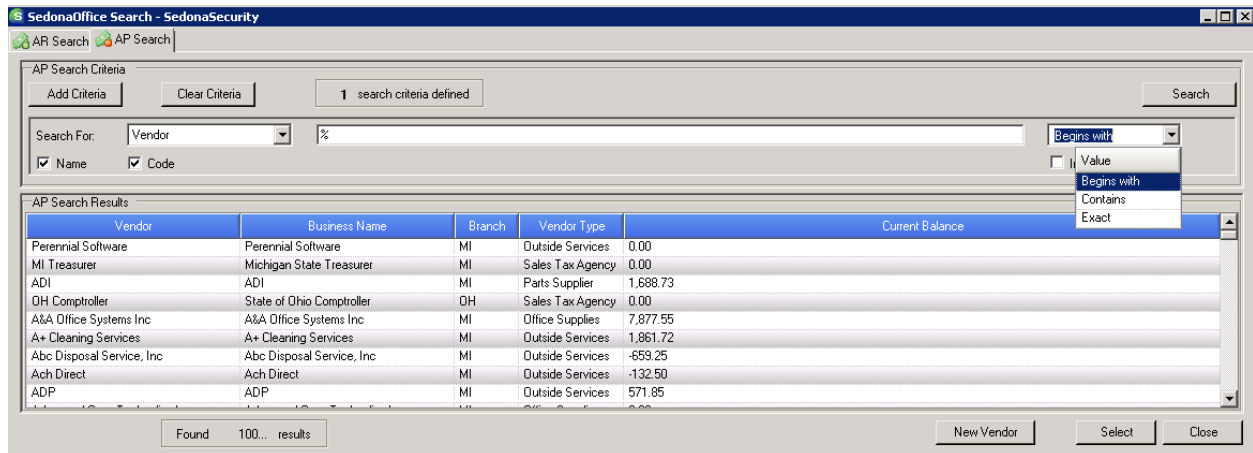
Part Code	Description	Vendor Part	Plg_Qty	Quantity	Cost	Amount	Serial No	Lot No	Stand Cost
029701-32	6112U5412VDC STRIKE 12V	029701-32	1	1	246.0000	246.00			246.0000

Part Total: 246.00
Expense Total: 0.00

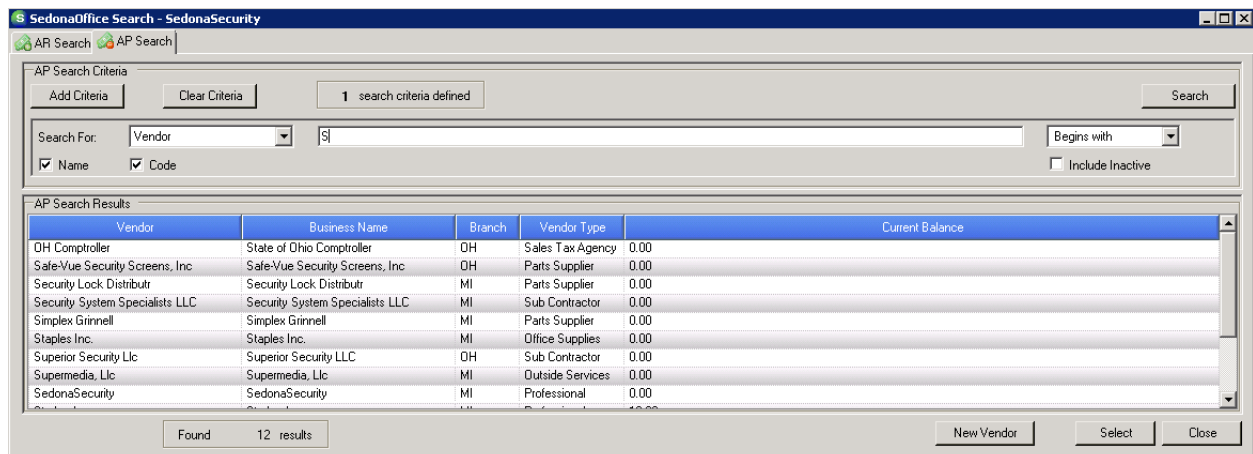
Print Stock Labels Apply Save Close

Vendor Search

A new vendor search utility has been written to enable users to quickly find vendors without having to scroll through an entire list. When the vendor search button is first accessed, all vendors will be selected (noted by the percentage sign %).



To refine the list, users may now elect to search vendor names and/or vendor codes using either "Begins with", "Contains", or "Exact". The default is "Begins With." Users have the choice of including or excluding inactive vendors in their choices. User preferences for searching by "Begins with", "Contains", or "Exact" will be saved. The example shows all vendor names or business names beginning with "S".




Using the “Add Criteria” button enables the results to be further filtered by purchase order number, address, branch, bill reference number, check number, credit reference number, receipt reference number, return reference number or vendor type in conjunction with the drop selections of “Begins With”, “Contains” or “Exact”.

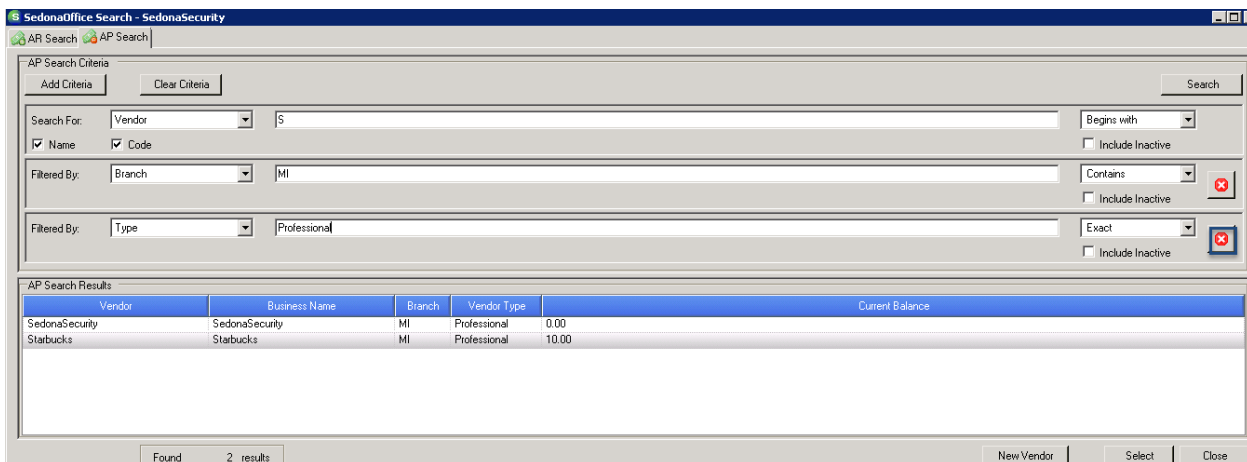
The screenshot shows the 'SedonaOffice Search - SedonaSecurity' window. The 'AP Search Criteria' section has 'Add Criteria' and 'Clear Criteria' buttons. The 'Search For' dropdown is set to 'Vendor' with a search term 'S'. The 'Filtered By' dropdown is set to 'Branch' with a value 'MI'. A dropdown menu is open for 'Criteria', showing options: Vendor, PO, Address, Branch, Bill, Check, Credit, Receipt, and Return. The 'Contains' operator is selected for the filter. The 'AP Search Results' table shows 7 results.

Vendor	Business Name	Branch	Vendor Type	Current Balance
Security Lock Distributors	Security Lock Distributors	MI	Parts Supplier	0.00
Security System Specialists	Security System Specialists LLC	MI	Sub Contractor	0.00
Simplex Ginnell	Simplex Ginnell	MI	Parts Supplier	0.00
Staples Inc.	Staples Inc.	MI	Office Supplies	0.00
Supermedia, Llc	Supermedia, Llc	MI	Outside Services	0.00
SedonaSecurity	SedonaSecurity	MI	Parts Supplier	0.00
Starbucks	Starbucks	MI	Office Supplies	10.00

Found 7 results

New Vendor Select Close

Users may remove filters (starting from the bottom) by clicking on the  at the end of the filter criteria selection.



The screenshot shows the 'AP Search Criteria' section with the following settings:

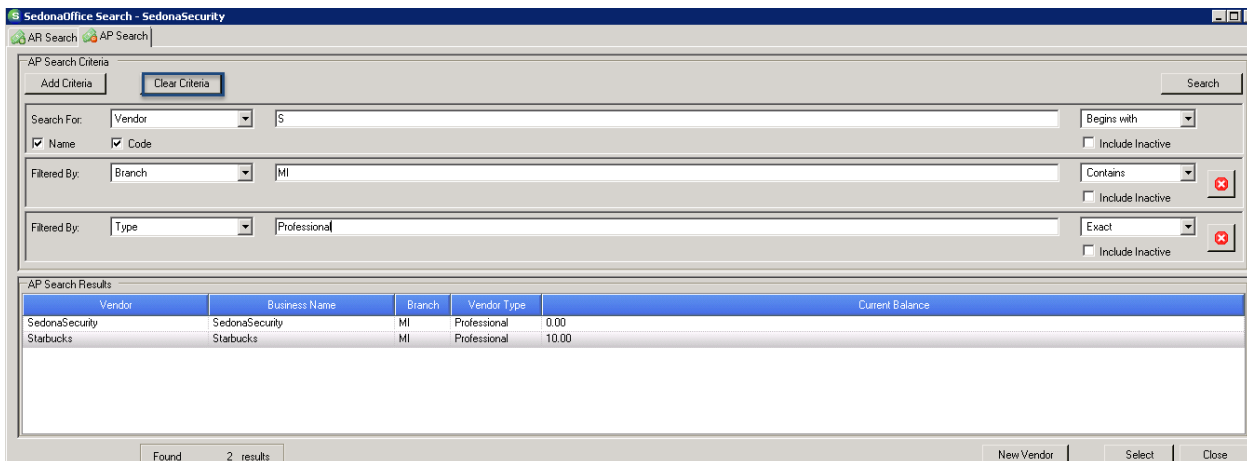
- Search For: Vendor | S
- Includes: ☒ Name, ☒ Code
- Filtered By: Branch | MI
- Includes: ☐ Include Inactive
- Filtered By: Type | Professional
- Includes: ☐ Include Inactive

The 'AP Search Results' table shows the following data:

Vendor	Business Name	Branch	Vendor Type	Current Balance
SedonaSecurity	SedonaSecurity	MI	Professional	0.00
Starbucks	Starbucks	MI	Professional	10.00

Found 2 results

Users may clear out all criteria selections made by clicking on the Clear Criteria button.

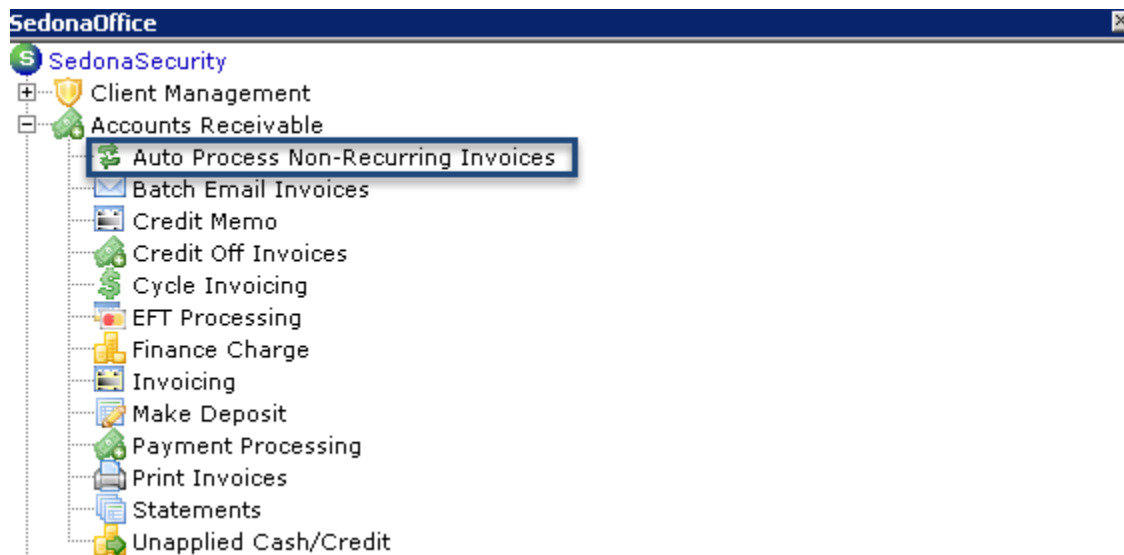


The screenshot shows the same 'AP Search Criteria' section as the previous image, but the 'Clear Criteria' button is highlighted with a red box. The search results table remains the same.

Accounts Receivable

Auto Processing Non-Recurring Invoices

The button for auto processing of non-recurring invoices has been moved out of the EFT Processing screen and will now appear as its own selection within Accounts Receivable. This enables a separation of duties to occur when one individual needs to be able to process daily batch invoices for recurring items while another handles non-recurring invoices.

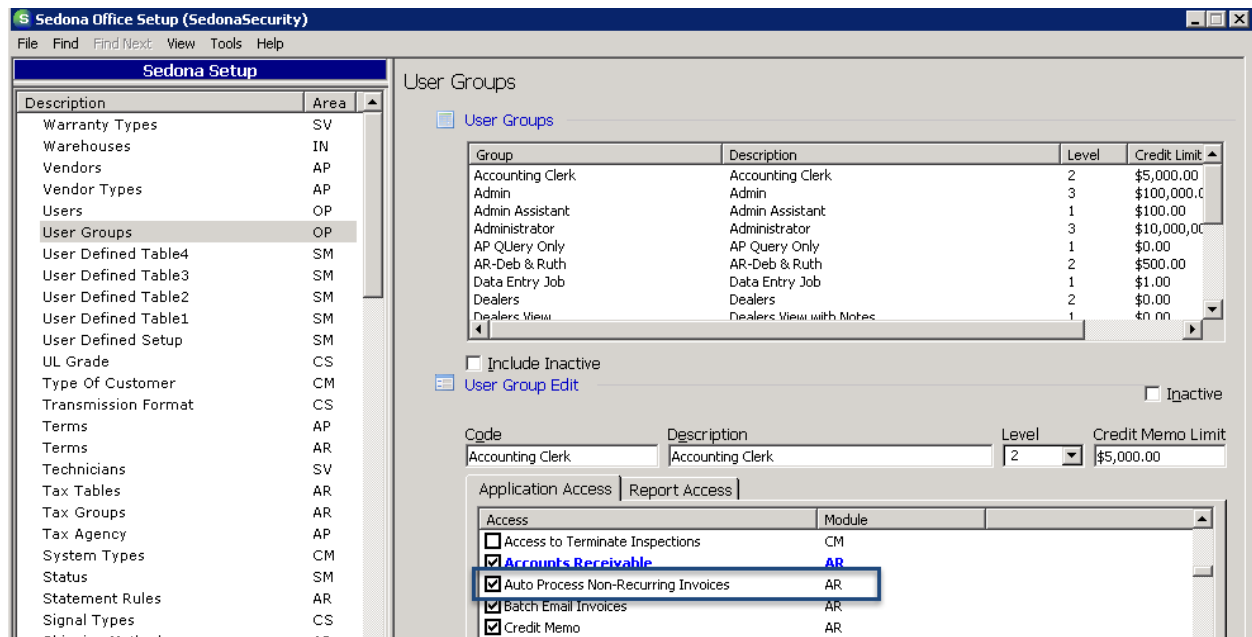


Users that are not familiar with this function are **highly encouraged** to read about (including the warning on its use) in the online help section of the manual before proceeding. Directions are available at

<https://sedonaoffice.perennialsoftware.com/SedonaOffice%20Help%202015/Index.htm>.

Navigate to the search tab, click on Phrase, and enter "Processing Non-Recurring EFT."

Users that need access to this function must also be given the new usergroup permission “Auto Process Non-Recurring invoices.”



BFIS Export

Customers that *reprint invoices* to show late fees charged on per invoice basis (e.g. customers that do not use the invoice/statement format for finance charges and that do not send out statements with late fees), may now export those invoices to BFIS to show those late fees.

The screenshot shows the 'Invoice' window in SedonaOffice. The top section contains fields for Customer ID (2251), Category (SVC Cont), A/R Account (110120), and Tax Group (MI-Wayne County). Below this, the invoice number is 475627. The customer information is Dr. Michael Brugg, 329 Candlewyck Dr., Lansing, MI 48901. The site address is the same. The invoice date is 7/7/2017, and the aging date is also 7/7/2017. The branch is MI, and the warehouse is blank. The invoice type is Miscellaneous, and the salesperson is Matt Miller. The posting date is 7/7/2017. The term is Due On Receipt. The items list shows one item: ADJ-ADD/UPG Job, with a quantity of 1, a rate of 1000.00, and an amount of 1,000.00. The summary table at the bottom right shows the following values:

Sub Total	1,000.00
Tax	72.50
Total	1,072.50
Balance Due	1,072.50
Late Fee	76.69

The bottom of the window shows a status bar with 'Complete' checked, 'Add to Print Queue' checked, and 'Last Printed: 11/29/2017'. The bottom right corner has buttons for 'Invoice List', 'EFT', 'Save', and 'Close'.

Cycle Invoice Purchase Order Numbers

In previous versions of SedonaOffice, a cycle PO number appeared on the invoice if the customer had a Blanket PO defined within Customer Information or if a cycle PO number had been defined on any of the systems. When one or more systems had a different PO number, the PO number assigned to the invoice was the first one that Sedona encountered in the course of cycle billing. With this version, there will be a test performed to determine if a cycle PO number should be assigned to the overall invoice or if the purchase order number should instead appear as a line item.

If the customer has a blanket Purchase Order defined within Customer Information, that purchase order number will display in the Purchase Order box on the cycle invoice.

If the customer does not have a blanket purchase order on file, but has the same Cycle PO number defined in the Cycle PO number box on all systems, then that Cycle PO number will be assigned to the cycle invoice.

If the customer does not have a blanket purchase order on file and does not have the same Cycle PO number assigned to each system, then no purchase order number will be assigned to the overall invoice. Each cycle PO number defined will appear as a line item on the invoice.

Note: The rules above will be followed when doing cycle billing through the Accounts Receivable-Cycle Billing program. Cycle invoicing for a single customer will not follow these rules until the next version.

Credit Memo Reversals

In previous versions of SedonaOffice, users had the ability to reverse the application of a credit memo regardless of whether it was applied to an invoice or a miscellaneous GL number. We are now blocking the ability to reverse a credit memo that either created a refund check or was applied to the Miscellaneous GL assigned to "Customer Refunds." This prevents a user from issuing a refund and then reversing the credit from which it was created so that further refunds can be made from the same credit. Users that attempt to reverse a credit that is tied to a refund check or to the GL number assigned for Customer Refunds will now see this notification message.

The screenshot displays the 'Credit Memo' window in SedonaOffice. The window title is 'Credit *** Credits Applied - Accounting Data Locked ***'. The 'Customer ID' is 24762, 'Category' is Admin G & A, 'Credit Account' is 240210, and 'Tag Group' is MI-Wayne County. The 'Credit Memo' section shows 'Brewed Awakenings' at '2 W. Union Street, Detroit, MI 48201'. The 'Credit Date' is 11/29/2017, 'Credit Number' is 475625, 'Branch' is MI, 'Warehouse' is blank, 'Salesperson' is Matt Miller, 'Credit Type' is Miscellaneous, 'Job #' is 000, and 'Posting Date' is 11/29/2017. The 'Items' section shows 'Items \$100.00' and 'Parts \$0.00'. The 'Item List' table has columns: Item, Date, Applied To, Invoice/Reference, Amount, Reversed, and User Code. The first row shows 'Equipr', '11/29/2017', 'Misc', '240120 - Customer Refu...', '107.25', 'N', and 'User Code'. An 'Action Denied' dialog box is overlaid on the 'Item List' table, displaying a yellow warning icon and the message 'You Cannot Reverse a Refund!'. The dialog has an 'OK' button. A blue arrow points from the 'Reverse' button in the 'Item List' table to the 'Action Denied' dialog box. Another blue arrow points from the 'OK' button in the 'Action Denied' dialog box to the 'Reverse' button. The 'Description' is 'Equipment Sales', 'Credit Reason' is 'Invoiced in Error', and 'Memo' is blank. The 'Sub Total' is 100.00, 'Tax' is 7.25, 'Total' is 107.25, and 'Credit Due' is 0.00. The 'Credit List', 'Save', and 'Close' buttons are at the bottom right.

Item	Date	Applied To	Invoice/Reference	Amount	Reversed	User Code
Equipr	11/29/2017	Misc	240120 - Customer Refu...	107.25	N	User Code

Action Denied
You Cannot Reverse a Refund!
OK

Sub Total: 100.00
Tax: 7.25
Total: 107.25
Credit Due: 0.00

Invoice Printing Preferences

The option to hide the remittance address is now offered on all standard invoice forms (Standard, Standard w/Payments, Bridgestone Standard, and Invoice Statements).

Printing Preferences

Form: Bridgestone Standard

Printer: HP Color LaserJet Pro MFP M277 Series Fax (redirecte

Paper | **Format** | Item Detail | Statement Detail | Late Fees | Custom

Title: (Default Form Title)

☐ Hide Customer Number

☐ Use Term Code (in place of due date)

Contract Info: (None)

Scanline Style: (None)

Scanline Prefix:

☒ Show Invoice Subtotal

☒ Show overview message

☒ Show Overview phone numbers

☒ Use resolution note in place of invoice memo for service invoices

☐ Show Company Name in Footer

☒ Hide remittance address

☐ Only print remittance coupon on first page

☐ Do not show this again

OK Cancel

Tax Exempt Line Items

When a customer has a capital improvement project (or other scenario in which an otherwise taxable customer cannot be charged tax), it is now possible to indicate specific line items for which tax cannot be charged. Placing a checkmark in the Exempt column prevents tax from being charged on that line item. Tax exempt line items may be defined on miscellaneous invoices, job invoices, and service invoices. For information on how to setup tax exempt line items, please see SedonaSetup – Tax Table in the Enhancements section of these release notes.

The screenshot displays the 'Invoice' window in SedonaOffice. At the top, there are dropdown menus for 'Customer ID' (7900), 'Category' (Jobs Com), 'A/R Account' (110120), and 'Tax Group' (MI). The 'Invoice # 475636' is displayed. The customer address is 'City Of Plymouth, 10 Prospect Street, Plymouth, MI 48170'. The site address is also 'City Of Plymouth, 10 Prospect Street, Plymouth, MI 48170'. The invoice date is 12/3/2017, and the aging date is 12/3/2017. The branch is MI, and the warehouse is Main-MI. The invoice type is Miscellaneous, and the salesperson is Matt Miller. The posting date is 12/3/2017. The terms are 'Due On Receipt'. The P.O. Number and Job # are blank. The subtotal is \$0.00, and the total is \$1,376.92. The 'Items' section shows a table with columns: Part, Description, Exempt, Qty, Unit Rate, and Amount. The table contains three items: 302AW135 (ALL WEATHER HEAT DETECTOR 135 DEGREES), 449CSRT (4-WIRE P/E SMOKE DETECTOR W/SOUNDER), and 5056 (MS-5024UD PANEL FIRE). The 'Exempt' column has checkboxes for each item, all of which are checked. The 'Amount' column shows the total for each item: 58.77, 125.24, and 1,008.90 respectively. The bottom of the window has a 'Description' field, a 'Contact' dropdown, and a 'Memo' field. The 'Sub Total' is 1,376.92, 'Tax' is 0.00, 'Total' is 1,376.92, and 'Balance Due' is 1,376.92. There are checkboxes for 'Complete' and 'Add to Print Queue', and 'Save' and 'Close' buttons.

Part	Description	Exempt	Qty	Unit Rate	Amount
302AW135	ALL WEATHER HEAT DETECTOR 135 DEGREES	<input checked="" type="checkbox"/>	2	58.77	
449CSRT	4-WIRE P/E SMOKE DETECTOR W/SOUNDER	<input checked="" type="checkbox"/>	2	125.24	
5056	MS-5024UD PANEL FIRE	<input checked="" type="checkbox"/>	1	1008.9	1,008.90
*		<input type="checkbox"/>			

Sub Total	
Sub Total	1,376.92
Tax	0.00
Total	1,376.92
Balance Due	1,376.92

Payment Processing

A new Purchase Order column has been added to Payment Processing to help identify invoices for which payment is either being added (positive payment batch) or being removed (negative payment batch).

Payment Processing

Batch Tape Amount: 100.00 Amount Entered: 0.00 Batch Balance: 100.00 Entry # 1 of 1

Branch: MI Customer: 47942 Invoice #: Address: Tequila Mockingbird, 6257 Old Field Road, Huntington, NY 11743 Memo: Balance to Apply: 100.00 Amount: 100.00 Payment Method: Check Check Number: 1263 Posting Date: 11/28/2017 Check Date: Other Credits: 0.00

Invoices | Other |

Site Name	Invoice #	Date	Amount	Net Due	Payment	Purchase Order
Tequila Mockingbird	469138	10/15/2017	2250.00	2250.00	100.00	
Tequila Mockingbird	469141	10/15/2017	500.00	500.00		
Tequila Mockingbird	469142	10/15/2017	2970.00	2970.00		
Tequila Mockingbird	469143	10/15/2017	2400.00	2400.00		945
Tequila Mockingbird	469149	10/15/2017	121.90	121.90		963
Tequila Mockingbird	474770	11/1/2017	142.57	142.57		
Tequila Mockingbird	475019	10/27/2017	2198.36	2198.36		1040

Total Due: \$10,582.83 Auto Clear

View Checks Import Lockbox Scan Batch Save Close

Statements

A new option has been added to enable the creation of statements for customers that have credit balances only.

S Statements

Select Customers | Statement List

Last Statement Date

Customers who have not received a statement as of: 11/25/2017

Create Statements For

☐ All Customers

☐ All Non Zero Customers

☐ AR Balance

Minimum Balance 5.00

Minimum Days Past Due 1

☒ Credit (negative) balances only

☐ Separate Statement By Billing Address

Branch

All

MUST ASSIGN

AB

Ace Security Systems

ADI Integration

Americas Best

Andrea Security Company

☐ Hide Inactive Branches

☐ Filter for Emailing

Print Options

Date of Statement 11/25/2017

Statement Due Date 12/5/2017

Sort By Customer Number

31-60 This is a friendly reminder that your account is past due.

61-90 Your account is past due-to avoid interruption of service, please send your payment today

Over 90 Your account is PAST DUE. Please send your payment today to avoid collection actions.

☐ Recalculate and Show Late Fees

Minimum Days Past Due 30

As of 11/25/2017

Minimum Invoice Balance \$ 1.00

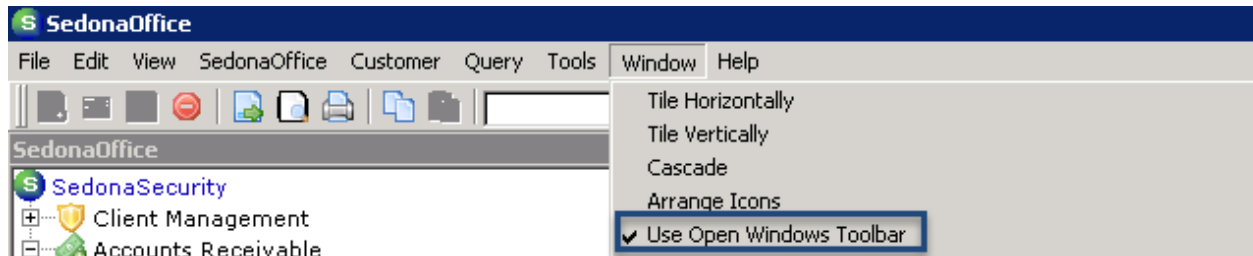
Annual Interest Rate % 18




Minimum Charge \$ \$3.88

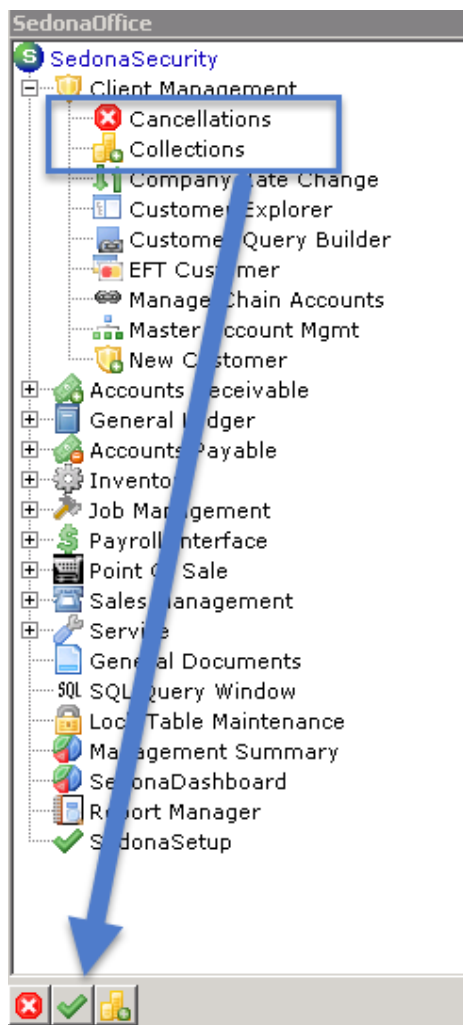
Close

Application Menu

A new addition has been made to the Applications Menu under Windows. The “Use Open Windows Toolbar adds a button to the toolbar in the lower left-hand corner of the screen with icons corresponding to specific application modules that are open in the background.



In the screenshot below, the Cancellations (identified by the icon ) and Collections (identified by the icon ) modules are open in the background. The current screen is identified by the checkmark icon , if none of the modules are open in the background then all icons show.



Clicking on a button in the toolbar will bring that window to the front. Hovering over a button will show the name of the module that the icon represents.



Client Management

Customer Equipment List

Local Zone

The Materials List on a job now contains a local zone column. When the job is closed, and the equipment is transferred from the job onto the customer equipment list, its local zone location will be moved with it.

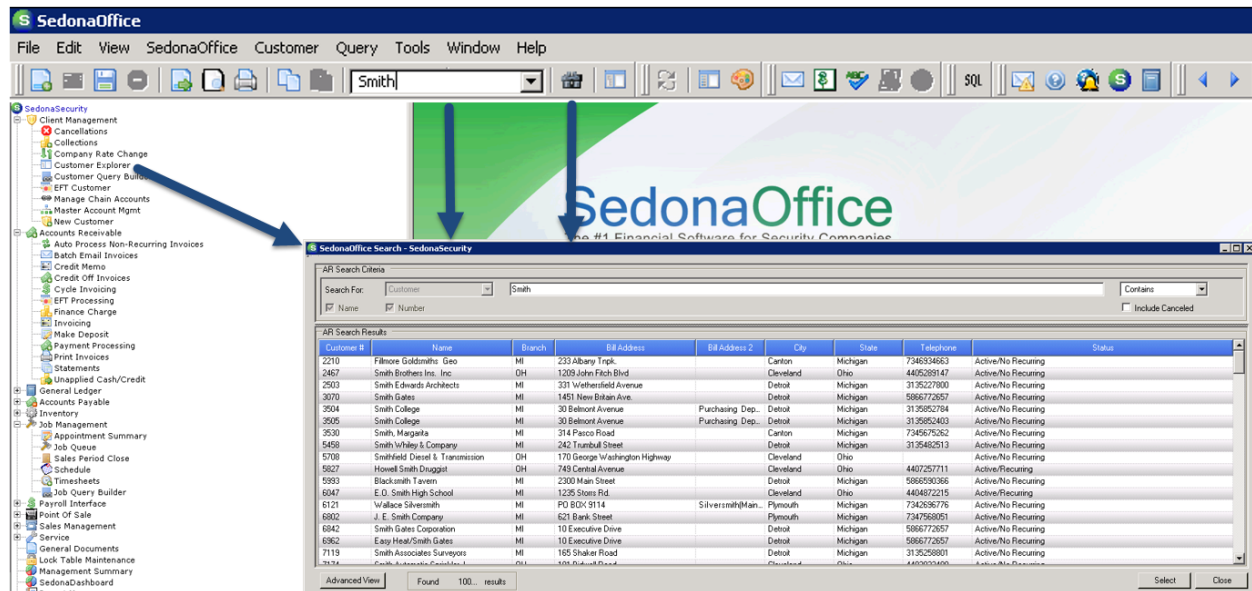
The screenshot shows the 'Equipment Edit 35075' window. The 'Customer Information' tab is active, displaying site and system details. Below this, the 'Equipment Detail' tab is selected, showing fields for Part Code, Quantity, Price, Location, Local Zone, Serial Number, Lot Number, Manuf Warranty, Warranty Start, Manuf Exp Date, Other Warranty, and a checkbox for 'Covered By Contract'. The 'Local Zone' field is highlighted with a blue box and contains the value '2'. The 'Part Code' field contains '470PB' and the description 'LOW TEMP PROBE TO 5821' is visible below it. The 'Quantity' field contains '1' and the 'Price' field contains '\$0.00'. The 'Location' field is empty. The 'Serial Number' and 'Lot Number' fields are empty. The 'Manuf Warranty' dropdown menu is set to 'No Warranty'. The 'Warranty Start' and 'Manuf Exp Date' fields are empty, each with a calendar icon to its right. The 'Other Warranty' dropdown menu is empty. The 'Covered By Contract' checkbox is checked. At the bottom right, there are 'Save' and 'Close' buttons.

Field	Value
Site	Denise Gordon 166 Gulf Rd 6691377 Intrusion
System	Intrusion
Part Code	470PB
Quantity	1
Price	\$0.00
Location	
Local Zone	2
Serial Number	
Lot Number	
Manuf Warranty	No Warranty
Warranty Start	
Manuf Exp Date	
Other Warranty	
Covered By Contract	<input checked="" type="checkbox"/>

Customer Search

The customer search function has been completely rewritten to enable users to find customers based on the selection of single or multiple criteria. Clicking on either the binoculars or the Customer Explorer button will bring up the new search window.

Entering a name into the search window that returns more than one customer will also bring up the window.



There are two search methods provided. "Simple View" is the default and is designed for single search criteria. "Advanced View" may be used when multiple criteria need to be defined to find the customer.

Simple View

Simple View enables customer searches to be performed using either the customer's name or their customer number. Users may select how they search for the customer by selecting "Begins With", "Contains" or "Exact" from the drop-down list.

SedonaOffice Search - SedonaSecurity

AR Search | AP Search

AR Search Criteria

Add Criteria Clear Criteria 1 search criteria defined Search

Search For: Customer Search: Tequila Contains Value Begins with Contains Exact

☒ Name ☒ Number

AR Search Results

Customer #	Name	Branch	Bill Address	Bill Address 2	City	State	Telephone	Status	Type
47942	Tequila Mockingbird	MI	6257 Old Field Road		Huntington	New York		Active/Recurring	Residential

Simple View Found 1 results Select Close

Users may elect to include or exclude cancelled customers from the search.

SedonaOffice Search - SedonaSecurity

AR Search Criteria

Search For: Customer Search: Jane Begins with Include Canceled

☒ Name ☒ Number

AR Search Results

Customer #	Name	Branch	Bill Address	Bill Address 2	City	State	Telephone	Status	Type
11978-225	Jane Smith	MI	34 Meadow Ridge		Plymouth	Michigan	7346733607	Active/No Recur...	Commercial
14934-17	Jane Fonda	MI	135 Bond Street		Cleveland	Ohio	4402360056	Active/No Recur...	Commercial
16987-399	Janet Koch	MI	95 Judson Avenue		Novi	Michigan		Active/Recurring	Commercial
11158-6	Janet Kaplan	MI	1316 N. Asylum Ave.		Cleveland	Ohio	4402311904	Active/Recurring	Commercial

Advanced View Found 4 results Select Close

Using Begins With

The search criteria “Begins With” will examine both the customer name and number for a match based on how they are entered into the system. For example, if your company uses last name followed by first name to identify a customer, then that is the order that should be used to find the customer when using “Begins With”. In the example below, a search on Smith returned customers whose last name begins with Smith in addition to corporate customers whose name begins with Smith.

SedonaOffice Search - SedonaSecurity

AR Search Criteria

Search For:

☒ Name ☒ Number ☐ Include Canceled

AR Search Results

Customer #	Name	Branch	Bill Address	Bill Address 2	City	State	Telephone	Status
2467	Smith Brothers Inc.	OH	1209 John Fitch Blvd		Cleveland	Ohio	4405289147	Active/No Recurring
2503	Smith Edwards Architects	MI	331 Wethersfield Avenue		Detroit	Michigan	3135227800	Active/No Recurring
3070	Smith Gates	MI	1451 New Britain Ave.		Detroit	Michigan	5866772657	Active/No Recurring
3504	Smith College	MI	30 Belmont Avenue	Purchasing Dep...	Detroit	Michigan	3135852784	Active/No Recurring
3505	Smith College	MI	30 Belmont Avenue	Purchasing Dep...	Detroit	Michigan	3135852403	Active/No Recurring
3530	Smith, Margarita	MI	314 Pasco Road		Canton	Michigan	7345675262	Active/No Recurring
5458	Smith Whaley & Company	MI	242 Trumbull Street		Detroit	Michigan	3135482513	Active/No Recurring
5708	Smithfield Diesel & Transmission	OH	170 George Washington Highway		Cleveland	Ohio		Active/No Recurring
6842	Smith Gates Corporation	MI	10 Executive Drive		Detroit	Michigan	5866772657	Active/No Recurring
7119	Smith Associates Surveyors	MI	165 Shaker Road		Detroit	Michigan	3135258801	Active/No Recurring
7174	Smith Automatic Sprinkler I	OH	101 Bidwell Road		Cleveland	Ohio	4402242488	Active/No Recurring
7312	Smith College	MI	28 Lyman Road	Storage Area	Detroit	Michigan	3135852411	Active/No Recurring
8267	Smith, Jillian	OH	39 South Stone St		Chagrin Falls	Ohio	4406686248	Active/Recurring
10697	Smith, Eaton & Compan	OH	115 North Main Street		Cleveland	Ohio	4406212474	Active/Recurring
11067	Smith Hill Day Center	OH	25 Danforth Street		Cleveland	Ohio		Active/Recurring
11357	Smith Gates Corp.	MI	211 Bagley St		Detroit	Michigan	5866772657	Active/Recurring
11402	Smith Gates Corp. \$\$	MI	1451 New Britain Avenue		Detroit	Michigan	5866772657	Active/No Recurring
11500	Smith Auto Body	OH	251 Field Road		Cleveland	Ohio	4407403307	Active/Recurring

Advanced View Found 71 results Select Close

Using Contains

The search criteria “Contains” will examine both the customer name and customer number to see if any portion of it matches what is entered into the search field. In the example below “smith” is part of each customers’ name.

SedonaOffice Search - SedonaSecurity

AR Search Criteria

Search For:

☒ Name ☒ Number ☐ Include Canceled

AR Search Results

Customer #	Name	Branch	Bill Address	Bill Address 2	City	State	Telephone	Status
2210	Fillmore Goldsmiths Geo	MI	233 Albany Trpk.		Canton	Michigan	7346934663	Active/No Recurring
2467	Smith Brothers Inc.	OH	1209 John Fitch Blvd		Cleveland	Ohio	4405289147	Active/No Recurring
2503	Smith Edwards Architects	MI	331 Wethersfield Avenue		Detroit	Michigan	3135227800	Active/No Recurring
3070	Smith Gates	MI	1451 New Britain Ave.		Detroit	Michigan	5866772657	Active/No Recurring
3504	Smith College	MI	30 Belmont Avenue	Purchasing Dep...	Detroit	Michigan	3135852784	Active/No Recurring
3505	Smith College	MI	30 Belmont Avenue	Purchasing Dep...	Detroit	Michigan	3135852403	Active/No Recurring
3530	Smith, Margarita	MI	314 Pasco Road		Canton	Michigan	7345675262	Active/No Recurring
5458	Smith Whaley & Company	MI	242 Trumbull Street		Detroit	Michigan	3135482513	Active/No Recurring
5708	Smithfield Diesel & Transmission	OH	170 George Washington Highway		Cleveland	Ohio		Active/No Recurring
5827	Howell Smith Druggist	OH	743 Central Avenue		Cleveland	Ohio	4407257711	Active/Recurring
5933	Blacksmith Tavern	MI	2300 Main Street		Detroit	Michigan	5866590366	Active/No Recurring
6047	E.D. Smith High School	MI	1235 Storrs Rd.		Cleveland	Ohio	4404872215	Active/Recurring
6121	Wallace Silversmith	MI	PO BOX 9114	Silversmith(Main...	Plymouth	Michigan	7342696776	Active/No Recurring
6802	J. E. Smith Company	MI	621 Bank Street		Plymouth	Michigan	7347568051	Active/No Recurring
6842	Smith Gates Corporation	MI	10 Executive Drive		Detroit	Michigan	5866772657	Active/No Recurring
6962	Easy Heat/Smith Gates	MI	10 Executive Drive		Detroit	Michigan	5866772657	Active/No Recurring
7119	Smith Associates Surveyors	MI	165 Shaker Road		Detroit	Michigan	3135258801	Active/No Recurring
7374	Smith Automatic Sprinkler I	OH	101 Bidwell Road		Cleveland	Ohio	4402242488	Active/No Recurring

Advanced View Found 100... results Select Close

Using Exact

The search criteria “Exact” will examine both the customer name and customer number to see if it is the full name or number of the customer.

The screenshot shows the 'SedonaOffice Search - SedonaSecurity' window. The 'AR Search Criteria' section has 'Search For' set to 'Customer' and the search term 'Smith College'. The 'Include Canceled' checkbox is unchecked. The 'AR Search Results' table displays three results for Smith College.

Customer #	Name	Branch	Bill Address	Bill Address 2	City	State	Telephone	Status	Type
3504	Smith College	MI	30 Belmont Avenue	Purchasing Dep.	Detroit	Michigan	3135852784	Active/No Recur...	Commercial
3505	Smith College	MI	30 Belmont Avenue	Purchasing Dep.	Detroit	Michigan	3135852403	Active/No Recur...	Commercial
7312	Smith College	MI	28 Lyman Road	Storage Area	Detroit	Michigan	3135852411	Active/No Recur...	Commercial

At the bottom, the 'Advanced View' button is highlighted, and the status bar shows 'Found 3 results'.

Advanced View

Advanced View should be used when a customer search needs to involve more than one criteria. It uses all of the elements in Simple View but enables the user to filter the results based upon multiple criteria selections. To switch from Simple View to Advance View, click on the button on the bottom left-hand corner of the screen.

This screenshot is identical to the one above, showing the same search results for 'Smith College'. The 'Advanced View' button at the bottom left is highlighted with a blue border, indicating it is the focus of the instruction.

Finding A Customer Using Multiple Filters

Customers may be searched by their name, site, system, address, branch, check number, contact name, credit memo number, email address, invoice number, job number, service ticket number, telephone number or type of customer. Using the same methodology as Simple View, the criteria chosen must utilize the search methods of Begins With, Contains, or have the Exact wording as entered into the search field.

The screenshot shows the 'SedonaOffice Search - SedonaSecurity' window. The 'AR Search Criteria' section has 'Search For:' set to 'Customer'. A dropdown menu is open showing options: Name, Site, System, Address, Branch, Check, Contact, Credit, and Customer. The 'Contains' search method is selected. The 'AR Search Results' table displays the following data:

Customer #	Branch	Bill Address	Bill Address 2	City	State	Telephone	Status	Type
2002	Hale, Juliet	Branch		Canton	Michigan		Active/Recurring	Residential
2000	T. & J. Autobi	Check		Canton	Michigan	7345289337	Active/No Recur...	Commercial
2003	Hancock, R	Contact		Cleveland	Ohio		Active/No Recur...	Residential
2004	Conway, C	Credit		Solon	Ohio	4406350104	Active/No Recur...	Residential
2005	Hancock, D	Address		Cleveland	Ohio		Active/No Recur...	Residential
2006	Dyer, Douglas	OH		Cleveland	Ohio		Active/No Recur...	Residential
2007	Long, Julia	OH		Cleveland	Ohio	4402424601	Active/No Recur...	Residential
2008	Booth, George	OH		Cleveland	Ohio	4402468372	Active/No Recur...	Residential
2009	Buchanan, Isabel	OH		Cleveland	Ohio	4402785723	Active/No Recur...	Residential
2010	Stewart, Eve	OH		Cleveland	Ohio	4406438867	Active/No Recur...	Residential
2011	Ferguson, Kelly	MI		Plymouth	Michigan	7342424918	Active/No Recur...	Residential
2012	Jacobs, Darren	OH		Solon	Ohio	4402330896	Active/No Recur...	Residential
2013	Mann, Braxton	MI		Novi	Michigan	7345226629	Active/No Recur...	Residential
2014	Chapman, Bobby	OH		Cleveland	Ohio		Active/No Recur...	Residential

The bottom of the window shows 'Simple View', 'Found 100... results', and 'Select Close' buttons.

In the example below, we are searching for all active customers whose system begins with "Fire."

The screenshot shows the 'SedonaOffice Search - SedonaSecurity' window. The 'AR Search Criteria' section has 'Search For:' set to 'System' and the search text 'Fire'. The 'Begins with' search method is selected. The 'AR Search Results' table displays the following data:

System Account	System Description	Customer #	Name	Branch	Bill Address	Bill Address 2	City	State	Telephone	Status	Type
A21398	Fire System	2130	Daughters Of The Holy Spirit	MI	7 Charter Oak Place	Holy Spirit	Detroit	Michigan	5867280051	Active/Recurring	Commerc
Z51964	Fire System	2242	Serrano, Madlene	OH	50 Whetten Rd	Unit 353	Chagrin Falls	Ohio	4402330461	Active/Recurring	Resident
A21125	Fire System	2242	Serrano, Madlene	OH	50 Whetten Rd	Unit 353	Chagrin Falls	Ohio	4402330461	Active/Recurring	Resident
L6115	Fire System	2246	Plyan, Marvin	OH	15 Rider Ln		Cleveland	Ohio	4405282559	Active/No Recur...	Resident
Z52722	Fire System	2593	Chagrin Falls Center For Advanced...	MI	510 Saybrook Rd	Ortopedics Surg...	Lansing	Michigan	5179334612	Active/No Recur...	Commerc
Z50052	Fire System	2635	Genitex Optics Inc	MI	PO BOX 307		Detroit	Michigan	5868523042	Active/No Recur...	Commerc
R40944	Fire System	2645	Hartman, Katrina	OH	PO BOX 308		Cleveland	Ohio	4407476017	Active/Recurring	Resident
R20906	Fire System	2680	Barker, Carina	OH	126 Day St	Unit 153	Cleveland	Ohio	4406530369	Active/Recurring	Resident
Z50031	Fire System	2701	Northland Investment Corporation	MI	350 Church Street		Detroit	Michigan	3136307245	Active/No Recur...	Commerc
Z50955	Fire System	2784	Franklin Academy	MI	106 River Road		Canton	Michigan	7348738619	Active/Recurring	Commerc
L3153	Fire System	2784	Franklin Academy	MI	106 River Road		Canton	Michigan	7348738619	Active/Recurring	Commerc
Z50958	Fire System	2784	Franklin Academy	MI	106 River Road		Canton	Michigan	7348738619	Active/Recurring	Commerc
L3150	Fire System	2784	Franklin Academy	MI	106 River Road		Canton	Michigan	7348738619	Active/Recurring	Commerc

The bottom of the window shows 'Simple View', 'Found 100... results', and 'Select Close' buttons.

The search can be further refined by adding more criteria. To add more criteria, press the Add Criteria button at the top of the window.

The screenshot shows the 'SedonaOffice Search - SedonaSecurity' window. The 'AR Search Criteria' section has 'System' selected in the 'Search For' dropdown and 'Fire' in the search text box. The 'BEGINS WITH' dropdown is set to 'BEGINS WITH'. The 'AR Search Results' table lists 100 results, showing columns for System Account, System Description, Customer #, Name, Branch, Bill Address, Bill Address 2, City, State, Telephone, Status, and T. The results are filtered by 'Fire'.

System Account	System Description	Customer #	Name	Branch	Bill Address	Bill Address 2	City	State	Telephone	Status	T
A21398	Fire System	2130	Daughters Of The Holy Spirit	MI	7 Charter Oak Place	Holy Spirit	Detroit	Michigan	5867280851	Active/Recurring	Commer
Z51964	Fire System	2242	Serrano, Marlene	OH	50 Whetten Rd	Unit 353	Chagrin Falls	Ohio	4402330461	Active/Recurring	Resident
A21125	Fire System	2242	Serrano, Marlene	OH	50 Whetten Rd	Unit 353	Chagrin Falls	Ohio	4402330461	Active/Recurring	Resident
L6115	Fire System	2246	Ryan, Marvin	OH	15 Rider Ln		Cleveland	Ohio	4405282559	Active/No Recur...	Resident
Z52722	Fire System	2583	Chagrin Falls Center For Advanced...	MI	510 Saybrook Rd.	Ortopedics Surg...	Lansing	Michigan	5179334612	Active/No Recur...	Commer
Z50052	Fire System	2635	Genlex Optics Inc	MI	PO BOX 307		Detroit	Michigan	5868523042	Active/No Recur...	Commer
R40944	Fire System	2645	Hartman, Katrina	OH	PO BOX 308	Unit 153	Cleveland	Ohio	4407476017	Active/Recurring	Resident
R20906	Fire System	2680	Barker, Carina	OH	126 Day St		Cleveland	Ohio	4405530369	Active/Recurring	Resident
Z50031	Fire System	2701	Northland Investment Corporation	MI	350 Church Street		Detroit	Michigan	3136307246	Active/No Recur...	Commer
Z50555	Fire System	2784	Franklin Academy	MI	106 River Road		Canton	Michigan	7348738619	Active/Recurring	Commer
L3153	Fire System	2784	Franklin Academy	MI	106 River Road		Canton	Michigan	7348738619	Active/Recurring	Commer
Z50558	Fire System	2784	Franklin Academy	MI	106 River Road		Canton	Michigan	7348738619	Active/Recurring	Commer
L3150	Fire System	2784	Franklin Academy	MI	106 River Road		Canton	Michigan	7348738619	Active/Recurring	Commer

Of the customers already selected, we want to refine our search to only those in the MI branch. The system will check the branch on both the customer and their site(s).

The screenshot shows the 'SedonaOffice Search - SedonaSecurity' window. The 'AR Search Criteria' section has 'System' selected in the 'Search For' dropdown and 'Fire' in the search text box. The 'BEGINS WITH' dropdown is set to 'BEGINS WITH'. The 'Filtered By' section has 'Branch' selected in the dropdown and 'MI' in the text box. The 'Contains' dropdown is set to 'CONTAINS'. The 'Include Inactive' checkbox is unchecked. The 'AR Search Results' table lists 100 results, showing columns for System Account, System Description, Customer #, Name, Branch, Bill Address, Bill Address 2, City, State, Telephone, Status, and T. The results are filtered by 'MI' branch.


System Account	System Description	Customer #	Name	Branch	Bill Address	Bill Address 2	City	State	Telephone	Status	T
2019FA	Fire System	2019	Aelna	MI	1000 Middle Street		Lansing	Michigan		Active/Recurring	Commer
2019FA	Fire System	2019	Aelna	MI	1000 Middle Street		Lansing	Michigan		Active/Recurring	Commer
2019FA	Fire System	2019	Aelna	MI	1000 Middle Street		Lansing	Michigan		Active/Recurring	Commer
2019FA	Fire System	2019	Aelna	MI	1000 Middle Street		Lansing	Michigan		Active/Recurring	Commer
2019FA	Fire System	2019	Aelna	MI	1000 Middle Street		Lansing	Michigan		Active/Recurring	Commer
R10973	Fire System	2044	Advanced Property Management	MI	19 Woodland Street		Detroit	Michigan	5866441571	Active/Recurring	Commer
19047	Fire System	2044	Advanced Property Management	MI	19 Woodland Street		Detroit	Michigan	5866441571	Active/Recurring	Commer

Of the customers found, we only want to see the one(s) whose email address contains
“.aol.com”

The screenshot shows the 'SedonaOffice Search - SedonaSecurity' window. The 'AR Search Criteria' section has 'Search For' set to 'System' and 'Fire'. The 'Filtered By' section has 'Branch' set to 'MI' and 'Email' set to '.aol.com'. The 'AR Search Results' table shows two results:

System Account	System Description	Customer #	Name	Branch	Bill Address	Bill Address 2	City	State	Telephone	Status	Type
31705-13-02A	Fire System	31705-13	Plymouth Plantation-Admin (Fire)	MI	137 Warren Avenue		Plymouth	Michigan	7347461622	Active/Recurring	Commercial
31705-13-02B	Fire System	31705-13	Plymouth Plantation-Admin (Fire)	MI	137 Warren Avenue		Plymouth	Michigan	7347461622	Active/Recurring	Commercial

Removing Filtering Criteria

In the event that specific filtering criteria was incorrectly chosen, the user may remove the last criteria selected by pressing the  button next to the line at the end of the row. Once the last selection is removed, the user may select a new criteria line to replace it.

The screenshot shows the 'SedonaOffice Search - SedonaSecurity' window. The 'AR Search Criteria' section has 'Search For' set to 'System' and 'Fire'. The 'Filtered By' section has 'Branch' set to 'MI' and 'Email' set to '.aol.com'. The 'AR Search Results' table shows two results:

System Account	System Description	Customer #	Name	Branch	Bill Address	Bill Address 2	City	State	Telephone	Status	Type
31705-13-02A	Fire System	31705-13	Plymouth Plantation-Admin (Fire)	MI	137 Warren Avenue		Plymouth	Michigan	7347461622	Active/Recurring	Commercial
31705-13-02B	Fire System	31705-13	Plymouth Plantation-Admin (Fire)	MI	137 Warren Avenue		Plymouth	Michigan	7347461622	Active/Recurring	Commercial

Clearing the Criteria

All search criteria may be removed by clicking on the Clear Criteria button at the top of the search screen.

The screenshot shows the 'SedonaOffice Search - SedonaSecurity' window. At the top, there are tabs for 'AR Search' and 'AP Search'. Below the tabs, there is a 'Clear Criteria' button. The search criteria section includes a 'Search For' dropdown set to 'System', a text input field containing 'Fire', and a 'Begins with' dropdown. Below this, there is a 'Filtered By' dropdown set to 'Branch', a text input field containing 'MI', and a 'Contains' dropdown. There are also checkboxes for 'Customer' and 'Site', and an 'Include Inactive' checkbox. A 'Search' button is located at the top right of the criteria section. Below the criteria section, there is a table titled 'AR Search Results' with columns: System Account, System Description, Customer #, Name, Branch, Bill Address, Bill Address 2, City, State, Telephone, Status, and T. The table contains several rows of data, including '2019FA Fire System 2019 Aelna MI 1000 Middle Street Lansing Michigan Active/Recurring Commec' and 'R10973 Fire System 2044 Advanced Property Management MI 19 Woodland Street Detroit Michigan 5866441571 Active/Recurring Commec'. At the bottom of the window, there is a 'Simple View' button, a status bar showing 'Found 100... results', and 'Select' and 'Close' buttons.

System Account	System Description	Customer #	Name	Branch	Bill Address	Bill Address 2	City	State	Telephone	Status	T
2019FA	Fire System	2019	Aelna	MI	1000 Middle Street		Lansing	Michigan		Active/Recurring	Commec
2019FA	Fire System	2019	Aelna	MI	1000 Middle Street		Lansing	Michigan		Active/Recurring	Commec
2019FA	Fire System	2019	Aelna	MI	1000 Middle Street		Lansing	Michigan		Active/Recurring	Commec
2019FA	Fire System	2019	Aelna	MI	1000 Middle Street		Lansing	Michigan		Active/Recurring	Commec
2019FA	Fire System	2019	Aelna	MI	1000 Middle Street		Lansing	Michigan		Active/Recurring	Commec
R10973	Fire System	2044	Advanced Property Management	MI	19 Woodland Street		Detroit	Michigan	5866441571	Active/Recurring	Commec
19047	Fire System	2044	Advanced Property Management	MI	19 Woodland Street		Detroit	Michigan	5866441571	Active/Recurring	Commec

Central Station Integration

SedonaOffice is now offering basic integration to several third party Central Station software packages. Users of **CMS, CS-Stages AD, CS Stages-Rapid Response, and CS Stages-UCC** have the ability to create a new central station account through SedonaOffice, attach an existing central station account to a SedonaOffice system, and view select information on an already existing central station account. Companies that are interested in utilizing this new integration must be setup by our staff to use this feature. Please contact our sales office at info@sedonaoffice.com to schedule a demonstration or request installation.

While SedonaOffice supports the integration to these products, Perennial Software does not sell the central station software nor do we support it. Users of these software packages must be trained in its use by the software company prior to the integration. SedonaOffice personnel will not be able to answer any operational questions regarding these products. Users are responsible for providing our IT staff with the company username, password, service company number (if applicable), install company number (if applicable), as well as User-Level credentials (if issued by the central station software company) and URL for the web portal required by each central station software company prior to installation.

While the screens for each central station company will vary slightly, the procedures for accomplishing the tasks remain the same. Detailed directions are provided below for CMS. A reference guide for each system will be provided on our website at www.sedonaoffice.com.

Setup

Using the usercode Administrator, the SedonaOffice Administrator must access the Modules table within SedonaSetup. A checkmark must be placed in the box "Use Central Station Tracking."

The screenshot shows the 'Sedona Office Setup (SedonaSecurity)' window. On the left, a list of modules is shown with their descriptions and areas. The 'Sedona Modules' module is selected. On the right, the 'Sedona Modules' configuration screen is displayed. It includes a 'Sedona Processing Options' section with a 'Processing Level' dropdown set to '1' and a 'Change Password Every' field set to '0' days. Below this, the 'Use Sedona Modules' section is checked, and several checkboxes are listed: 'Use Client Management?', 'Use Accounts Receivable?', 'Use General Ledger?', 'Use Accounts Payable?', 'Use Central Station Tracking?' (highlighted with a red box), 'Use Job Management?', 'Use Sales Management?', 'Use Stock Tracking?', and 'Use Service?'. At the bottom, the 'Region' section is checked, with 'Country' set to 'US' (United States) and 'EIN' set to '123456789'. An 'Apply' button is located at the bottom right.

Description	Area
Sedona Modules	OP
Custom Fields Setup (Vendor)	AP
Custom Fields Table1 (Vendor)	AP
Custom Fields Table2 (Vendor)	AP
Custom Fields Table3 (Vendor)	AP
GL Account Defaults	AP
Setup Processing	AP
Shipping Methods	AP
Tax Agency	AP
Terms	AP
Vendor Types	AP
Vendors	AP
Aging Buckets	AR
Alternate Company Addresses	AR
Banks	AR
Check 21 Setup	AR
Credit Reason	AR
EFT Credit Card Types	AR
EFT Setup	AR
GL Account Defaults	AR
Invoice Descriptions	AR
Invoice Items	AR
Item Types	AR
Late Fee Rules	AR
Setup Processing	AR
Statement Rules	AR
Tax Groups	AR
Tax Tables	AR
Terms	AR
Cancellation Profiles	CM
Cancellation Tasks	CM
Chain Accounts	CM
Collection Statuses	CM
Custom Fields Setup(Customer)	CM
Custom Fields Setup(Site)	CM
Custom Fields Setup(System)	CM

Sedona Modules

☒ Sedona Processing Options

Processing Level: 1 *Low - Basic Sedona Processing*

Change Password Every: 0 Days

☒ Use Sedona Modules

☒ Use Client Management?

☒ Use Accounts Receivable?

☒ Use General Ledger?

☒ Use Accounts Payable?

☒ Use Central Station Tracking?

☒ Use Job Management?

☒ Use Sales Management?

☒ Use Stock Tracking?

☒ Use Service?

☒ Region

Country: US *United States*

EIN: 123456789

Apply

Once IT has turned on CMS, the Alarm Company CMS will be displayed in the list of Alarm Companies in the Alarm Companies Setup Table.

Sedona Office Setup (SedonaSecurity)

File Find Find Next View Tools Help

Sedona Setup

Description	Area
Custom Fields Table2 (Customer)	CM
Custom Fields Table1(Part)	IN
Custom Fields Table1 (Vendor)	AP
Custom Fields Table1 (System)	CM
Custom Fields Table1 (Site)	CM
Custom Fields Table1 (Service)	SV
Custom Fields Table1 (Job)	JM
Custom Fields Table1 (Customer)	CM
Custom Fields Setup(System)	CM
Custom Fields Setup(Site)	CM
Custom Fields Setup(Service)	SV
Custom Fields Setup(Part)	IN
Custom Fields Setup(Customer)	CM
Custom Fields Setup (Vendor)	AP
Custom Fields Setup (Job)	JM
Credit Reason	AR
Create Accounting Periods	GL
Contract Forms	JM
Competitors	SM
Company Edit	OP
Commission Types	JM
Collection Statuses	CM
Check 21 Setup	AR
Chart of Accounts	GL
Chain Accounts	CM
Central Station Tracking Defaults	OP
Categories	GL
Cancellation Tasks	CM
Cancellation Profiles	CM
Branches	GL
Banks	AR
Authorities	CS
Alternate Company Addresses	AR
Alarm Services	CS
Alarm Companies	OP
Aging Buckets	AR

Alarm Company

☐ Alarm Company

Code	Description	Inactive
Alarmnet	Alarmnet	N
CMS	CMS	N
CSI	CSI	N
SedonaSecurity	SedonaSecurity	N
StagesAg	Stages AG	N
StagesRapid	Stages Rapid	N
StagesUcc	Stages UCC	N

☐ Include Inactive

☒ Alarm Company Edit ☐ Inactive

Code

Description

Code	Description	Amount
------	-------------	--------

Service Description Monthly Amount

Save New Remove

☐ Update Customer Monitoring

Apply New Delete

CMS will assign a block of system account numbers to your company. SedonaOffice does not track these numbers or report on the ones that have not been used. To ensure that you do not assign the same system account to more than one system, it will be important for the System Administrator to navigate to the SedonaSetup table entitled "Setup Defaults-AR" and place a checkmark in the boxes to require system accounts to be assigned and that those account numbers be unique.

The screenshot shows the "Sedona Office Setup (SedonaSecurity)" window. On the left is a tree view titled "Sedona Setup" with a list of items and their corresponding areas. The "Setup Processing" item under the "AR" area is selected. The main pane on the right is titled "Setup Processing" and contains several sections of configuration options.

Description	Area
Vendors	AP
Vendor Types	AP
Users	OP
User Groups	OP
User Defined Table4	SM
User Defined Table3	SM
User Defined Table2	SM
User Defined Table1	SM
User Defined Setup	SM
UL Grade	CS
Type Of Customer	CM
Transmission Format	CS
Terms	AP
Terms	AR
Technicians	SV
Tax Tables	AR
Tax Groups	AR
Tax Agency	AP
System Types	CM
Status	SM
Statement Rules	AR
Signal Types	CS
Shipping Methods	AP
Setup Processing	AP
Setup Processing	AR
Setup Processing	JM
Setup Defaults	SV
Service Ticket Message	SV
Service Levels	SV
Service Companies	SV
Sedona Modules	OP
Scheduling and Appointments	SV
Sales Resolution Codes	SM
Sales Managers	SM
Sales Items	SM
Sales Departments	SM

Setup Processing

Numbering

Auto Invoice ☒ Auto Job Number ☐
Next Invoice 475692 Next Job Number 1851
Auto Customer ☒
Next Customer 47985

Invoicing and Credits

Cycle Beginning Day ☒ Print Customer Number on Invoices and Statements
☒ First Day of Month ☒ Allow Printed Invoices to be Edited
☐ Day of Service Start ☒ Enter Separate Posting Date for Invoices and Credits
☒ Allow direct invoicing to Master Account
☒ Use Credit Request Processing
☒ Require Credit Reason on Credit Memos

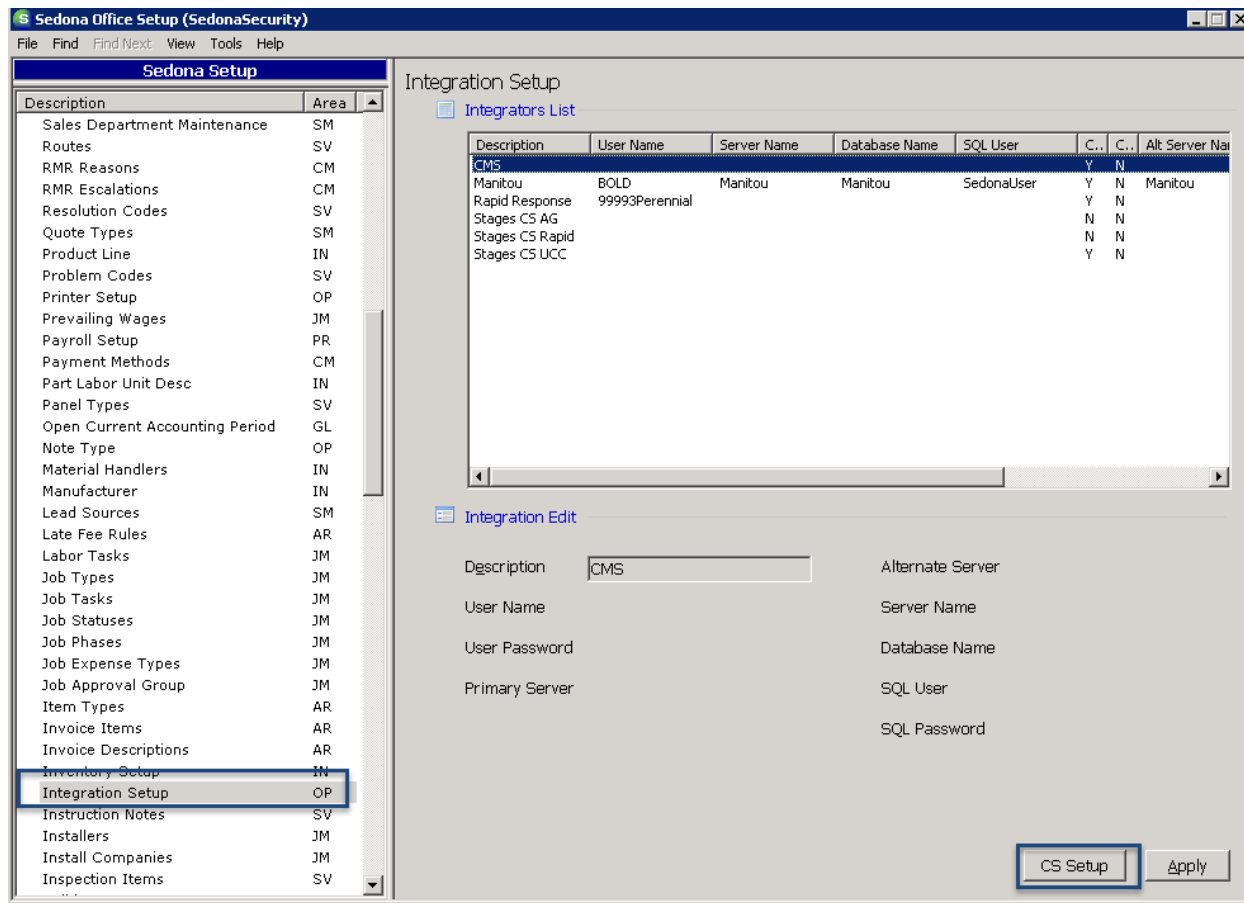
Other

☒ GL Categories required for Income and Expenses Group Deferred Revenue By ☐ GL Account
☐ Activate Customer Group Security by User ☒ Item Type
Customer Group []
☒ Enable Activity Tracking ☒ Require Tape Totals to Match Deposit Amount in order to Make Deposit
☒ Screen Employees by Type
☒ Allow Site Only RMR
☐ Allow Quantity Based RMR

Apply

Integration Setup

Navigate to the Integration Setup table within SedonaSetup. Highlight CMS and click on CS Setup.



CMS Credentials Setup

Beside web service credentials, CMS filters inbound traffic to their web service based upon the IP address of the request. ***Customers must discuss this IP Address with CMS prior to integration to ensure that the Central Station integration feature will function properly.*** CMS will provide credentials to the customer for its web service as either company-wide settings or user-level settings. The company-wide credentials approach means that one set of credentials will be used by any user using CMS's web service. User-level credentials means every user has their own unique set. Tabs appear in the form for each approach (A and B).

Enter the user name, password, service company number, install service company number, and service URL issued to you by CMS in the boxes below.

To use user-level security, check the Use User Level Security check box, select the User Level Credentials tab, and enter individual user's user names and passwords. (The user name and password on the Company Settings tab will be ignored.)

A Company Settings | **B** User-Level Credentials

☐ Use User Level Security **C**

User Name: INT2079998

Password:

Service Company Number: 2079998

Install Company Number: 2079998

Service URL: https://css.protectionone.com/masinterface_dev/connection.aspx

E Test

Save Cancel

If CMS issues your company User Level Security credentials, a checkmark must be placed in this box. The User Level Credentials tab will be disabled (B) unless a checkmark is entered into the box. For company-wide credentials, the user must enter the values obtained from CMS into the text boxes in block (D). A test to check these credentials with CMS can be executed by clicking the Test button (E).

Setting up user level credentials (if supplied by CMS) is very similar with one important caveat. ***The caveat is that the values for Block D for Service Company Number, Install Company Number, and Service URL must still be entered for user-level credentials to function. A test box appears in the User-Level Credentials tab for***

Service Company Number but it should be left blank unless CMS instructs otherwise.

Creating a New Central Station Account

Please use the following steps to create a CMS system account.

Create a new system for the customer, entering their system account, type, and panel type (if known). Select CMS in the Monitored By field.

Leave the CMS Account Number blank. This indicates that you are creating a new account with CMS.

Click the CMS Info button at the bottom of the form.

If any central station information exists within SedonaOffice Central Station (C/S button) for the system (e.g. contacts and zones), the user will be prompted to export the data into the Central Station System Form.

47984 47984 Intrusion System

Customer: 47984
Wile E. Coyote

Address: 123 Cactus Way
Quemado, NM 87829

System | Custom Fields | Recurring | Equipment | Inspections | Notes & Comments

System Information

System Account: TSTABC202

System Type: Intrusion

Panel Type: ADEMCO 340

Location:

Mem:

Monitored By: CMS

CMS Account Number:

Contract Information

Contract Form: 3 Year

Contract Number: 27710

Contract Date: 12/1/2017

Contract Length: 36 Renewal Months: 0

OK to Rate Increase After: 11/30/2020

Cycle P.O.: 4572

Cycle PO Expires:

Secondary Information

System Account:

Panel Type:

Transmission Format:

Service Information

Warranty: 90-P 30-L

Warranty Start:

Service Level: T&M-Res

Primary Service Co: SedonaSecurity

Alt Service Co 1:

Alt Service Co 2:

Require PO: ☐

Critical Message

Expires On:

☐ Inactive

C/S Info | **CMS Info** | U/D Info

Save Close

If any information exists in the SedonaOffice Central Station application (button marked C/S), the user will be prompted if they would like this information exported to CMS.

The screenshot shows the '47984 TSTABC202 Intrusion System' window. The form is divided into several sections: System Information, Secondary Information, Service Information, and Contract Information. The 'System Information' section includes fields for System Account (TSTABC202), System Type (Intrusion), Panel Type (ADEMCO 340), Location, Memo, Monitored By (CMS), CMS Account Number, and Contract Information (Contract Form: 3 Year, Contract Number: 27710, Contract Date: 12/1/2, Contract Length: 36, OK to Rate Increase After: 11/30/, Cycle P.O.: 4572, Cycle PO Expires). The 'Secondary Information' section includes System Account, Panel Type, and Transmission Format. The 'Service Information' section includes Warranty (90-P 30-L), Warranty Start, Service Level (T&M-Res), Primary Service Co (SedonaSecurity), and Alt Service Co. The 'Contract Information' section includes Contract Form, Contract Number, Contract Date, Contract Length, OK to Rate Increase After, Cycle P.O., and Cycle PO Expires. A dialog box titled 'Export Data?' is overlaid on the form, asking 'Central Station data exists in SedonaOffice for this system. Would you like to export it?' with 'Yes' and 'No' buttons. The bottom of the window has an 'Inactive' checkbox and buttons for 'C/S Info', 'CMS Info', 'U/D Info', 'Save', and 'Close'.

If no information exists in the Central Station (C/S) area, respond by pressing the No button. The CMS screen will appear.

If Central Station information does exist, respond by pressing the Yes button. Upon responding Yes, the CMS screen will open, *but it will be minimized at the bottom of the screen. Hover over the SedonaOffice button in the toolbar at the bottom of the screen, and select CMS to bring it to the forefront.* The CMS screen will appear.

The screenshot shows the 'CMS System' window with a menu bar (File, Preferences) and a main area divided into sections for Customer, Address, and CMS Account/Device information. Below this is a 'Contact List' tab with a table of contacts. The table has columns for Order, First Name, Last Name, Phone 1, Ext 1, Phone 1 Type, Phone 2, Ext 2, Phone 2 Type, Passcode, Authority, Medical, and Relationship. A single contact is listed: Order 0, First Name Road, Last Name Runner, Phone 1 (813) 555-1212, Ext 1 Home, Phone 1 Type Home, Phone 2, Ext 2 Home, Phone 2 Type Beep Beep, Passcode Full Access, Authority, Medical (checkbox), and Relationship. To the right of the table are up and down arrow buttons. At the bottom right are 'Save' and 'Close' buttons.

Order	First Name	Last Name	Phone 1	Ext 1	Phone 1 Type	Phone 2	Ext 2	Phone 2 Type	Passcode	Authority	Medical	Relationship
0	Road	Runner	(813) 555-1212		Home			Home	Beep Beep	Full Access	<input type="checkbox"/>	

CMS Central Station System Form

Customer: 47984 - Wile E. Coyote
Site: 1 - Wile E. Coyote
System: TSTABC202 - Intrusion System
Phone:

Address: 123 Cactus Way
 Quemado NM 87829

CMS Account Number: **Site Passcode:**

Device Type: ADEMCO 340

Contact List | Zones | Timer Test Settings | History

Order	First Name	Last Name	Phone 1	Ext 1	Phone 1 Type	Phone 2	Ext 2	Phone 2 Type	Passcode	Authority	Medical	Relationship
0	Road	Runner	(813) 555-1212		Home			Home	Beep Beep	Full Access	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Save **Close**

- Section A This system information is taken directly from the system form within SedonaOffice. It includes the customer name and number, the site name and address and a description of the system.
- Section B The CMS account number should be entered into the field entitled CMS Account Number as well as the Master Site Password provided by CMS. CMS may designate this as a transmitter code. CMS will issue a range of account numbers available for use. *The use of these numbers must be tracked outside of SedonaOffice. SedonaOffice has no way of tracking which codes have been used or auto assigning any account numbers.* If a user accidentally attempts to assign a previously used number, an error will be received at the time that the central station account is saved. CMS will also provide a site passcode. Please enter this in the Site Passcode field.
- Section C CMS has tabs for Contact List, Zones, Timer Settings, and History.
- Section D The order of contacts may be modified by highlighting a specific contact and using the up and down arrow to change their order.

Adding a Contact

New contacts may be added into the Contact List grid. These should be entered in priority order based on who should be contacted first. The first contact is always assigned the number 0. Position the cursor in the line underneath the first contact to add the next contact.

The screenshot shows the CMS System interface. At the top, there's a menu bar with 'File' and 'Preferences'. Below it, a form displays contact details: Customer (47984 - Wile E. Coyote), Site (1 - Wile E. Coyote), System (TSTABC202 - Intrusion System), and Phone. To the right, the Address is 123 Cactus Way, Quemado NM 87829. Below this, there are input fields for CMS Account Number (ABC201) and Site Passcode. The Device Type is listed as ADEMCO 340. A tabbed interface shows 'Contact List' selected, with other tabs for 'Zones', 'Timer Test Settings', and 'History'. The Contact List grid has columns: Order, First Name, Last Name, Phone 1, Ext 1, Phone 1 Type, Phone 2, Ext 2, Phone 2 Type, Passcode, Authority, Medical, and Relationship. It contains three rows of data. On the right side of the grid, there are up and down arrow buttons. At the bottom right, there are 'Save' and 'Close' buttons.

Order	First Name	Last Name	Phone 1	Ext 1	Phone 1 Type	Phone 2	Ext 2	Phone 2 Type	Passcode	Authority	Medical	Relationship
0	Road	Runner	(813) 555-1212		Home			Work	Beep Beep	Full Access	<input type="checkbox"/>	Corporate Of...
1	Elmer	Fudd	(734) 555-1212		Cell	(734) 555-2424		Home	Rabbit	Full Access	<input type="checkbox"/>	Facility
2											<input checked="" type="checkbox"/>	Facility

The Passcode is the word provided by each contact as a means of verifying their identity on the telephone. CMS requires that the Authority column contain "Full Access". This may be selected from the drop-down menu.

The order of the contacts displayed may be changed by using the up and down arrow button on the right-hand side of the screen.

Note: It is not currently possible to delete contacts through the integration. Users will need to access the CMS software to remove them.

Adding Zones

The zones tab identifies a specific area being monitored by the system. Zones may be entered directly into the grid. .

Zones are added by positioning the cursor under the first zone and typing in the required information. CMS will provide users with information on the Event Codes that they recognize in their system. Those entries must be typed into the Event Code field. At the request of CMS drop-down boxes are not provided.

The screenshot displays the 'CMS System' application window. The top menu bar includes 'File' and 'Preferences'. The main area is divided into several sections. On the left, there are labels for 'Customer', 'Site', 'System', and 'Phone'. To the right of these labels, the following information is displayed: Customer: 47984 - Wile E. Coyote, Site: 1 - Wile E. Coyote, System: TSTABC202 - Intrusion System, and Phone: (empty field). Below these labels, there are input fields for 'CMS Account Number' (containing 'ABC201') and 'Site Passcode' (empty field). To the right of the 'Site Passcode' field, there is an 'Address' label followed by '123 Cactus Way' and 'Quemado NM 87829'. Below the main information area, there is a tabbed interface with 'Contact List', 'Zones', 'Timer Test Settings', and 'History'. The 'Zones' tab is currently selected. The 'Zones' tab contains a table with three columns: 'Point', 'Location', and 'Event Code'. The table has two rows of data: Row 1: Point 1, Location Panic, Event Code TR0013; Row 2: Point 2, Location Front Door, Event Code TR0014. Below the table, there is a large empty white area. On the right side of the interface, there are two buttons with green arrows pointing up and down. At the bottom right of the window, there are 'Save' and 'Close' buttons.

Point	Location	Event Code
1	Panic	TR0013
2	Front Door	TR0014

Note: It is not currently possible to edit or delete zone information. Users will need to access the CMS software to make these changes.

Timer Test Settings

Timer Test Settings indicate whether CMS will be testing the system and the frequency of those tests. If the Activate Time Test checkbox is not checked, the values of the Interval and Test Type drop-down fields are not relevant.

The screenshot shows the 'CMS System' application window. The 'Timer Test Settings' tab is selected. The form contains the following fields and controls:

- Customer:** 47984 - Wile E. Coyote
- Site:** 1 - Wile E. Coyote
- System:** TSTABC202 - Intrusion System
- Phone:** (empty)
- Address:** 123 Cactus Way, Quemado NM 87829
- CMS Account Number:** ABC201
- Device Type:** ADEMCO 340
- Site Passcode:** (empty)
- Activate Timer Test:** ☐ (unchecked)
- Interval:** Daily (dropdown menu)
- Test Type:** Standard (dropdown menu)
- Buttons:** Save, Close

History

CMS history may not be viewed until such time as the CMS record has been added. This may be viewed once the addition is completed (see directions below).

Once all information has been entered into the CMS System Form, press Save.

The system will present the message:

The screenshot shows the 'CMS System' configuration window. The top section contains fields for Customer (47984 - Wile E. Coyote), Site (1 - Wile E. Coyote), System (TSTABC202 - Intrusion System), Address (123 Cactus Way, Quemado NM 87829), CMS Account Number (ABC201), and Site Passcode (Wayfair). Below these fields are tabs for Contact List, Zones, Timer Test Settings, and History. A date range filter is set from 11/19/2017 to 12/19/2017, with an 'Alarm Events Only' checkbox. A modal dialog is centered on the screen, displaying the SedonaOffice logo and the message 'Sending system to CMS. Please wait...'. At the bottom right of the window are 'Save' and 'Close' buttons.

When the acknowledgement notification comes up, the user may click on the OK button.



Sending system to CMS. Please wait...
Created system in CMS.

OK

Attaching a SedonaOffice Record To An Existing Central Station Account

Users may link a record created in CMS to a system within SedonaOffice. To link a SedonaOffice system record, please do the following:

Select the customer within SedonaOffice for which the link to the CMS is needed. Edit the customer's system.

Enter "CMS" from the Monitored By drop-down list.

Press the CMS button at the bottom of the screen. The system will respond:



Please wait...
Attempting to retrieve the system from
CMS.

Enter the CMS account number which has been assigned to the customer along with the master site password on the CMS Central Station System form.

Press Save to save on the CMS Central Station System form.

View an Existing CMS Record Within SedonaOffice

Users may view contact and zone information on an already existing CMS record within SedonaOffice. Users may add (but not edit or delete) information on the CMS System Form. Updates to contacts and zones must be done directly within the CMS software.

Users may view a CMS record by editing the system record within SedonaOffice and pressing the CMS button at the bottom of the screen. Users will receive the following message



Please wait...
Attempting to retrieve the system from
CMS.

The CMS record will display on the screen.

The screenshot shows the 'CMS System (ABC201)' window. It has a menu bar with 'File' and 'Preferences'. The main area is divided into sections for customer details, address, and a contact list.

Customer Information:

- Customer: 47984 - Wile E. Coyote
- Site: 1 - Wile E. Coyote
- System: TSTABC202 - Intrusion System
- Phone: (empty)

Address: 123 Cactus Way, Quemado NM 87829

Site Passcode: WAYFAIR

Buttons: Activate Test Mode

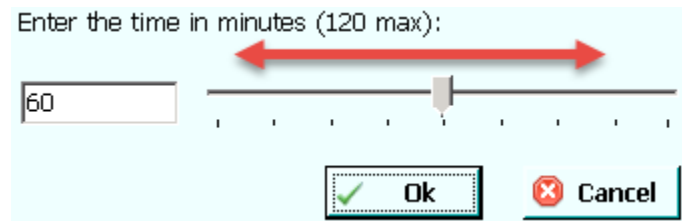
Contact List: Zones | History

Order	First Name	Last Name	Phone 1	Ext 1	Phone 1 Type	Phone 2	Ext 2	Phone 2 Type	Passcode	Authority	Medical	Relationship
0	ROAD	RUNNER	(813) 555-1212		Home			Home	BEEP BEEP	Full Access	<input type="checkbox"/>	Corporate...
1	ELMER	RUDD	(734) 555-1212		Cell	(734) 555-2424		Home	RABBIT	Full Access	<input type="checkbox"/>	Facility

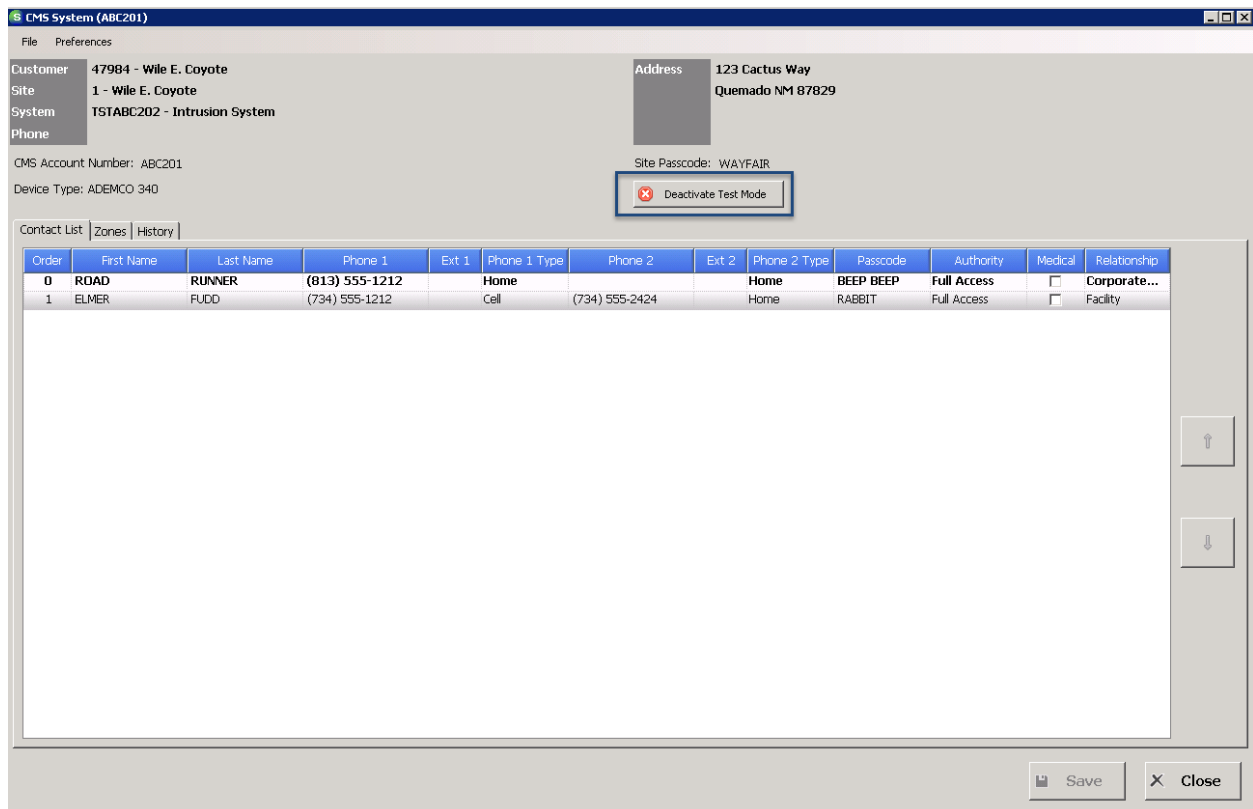
Buttons: Save, Close

Activate Test Mode

Users are able to activate and deactivate the test mode on a system. After the CMS record has been added, the Activate Test Mode button may be seen directly underneath the Site Passcode on the right-hand side of the screen. Users may enter the time in minutes (the default is 60) for test mode or they may use the slider to the right of the text box to designate a period higher or lower than 60 minutes. The minimum is set to 1 minute and the maximum to 120.



Once the time is set, the user should click on the OK button. Once this button is pressed, the button on the CMS system form will change to Deactivate Test Mode.



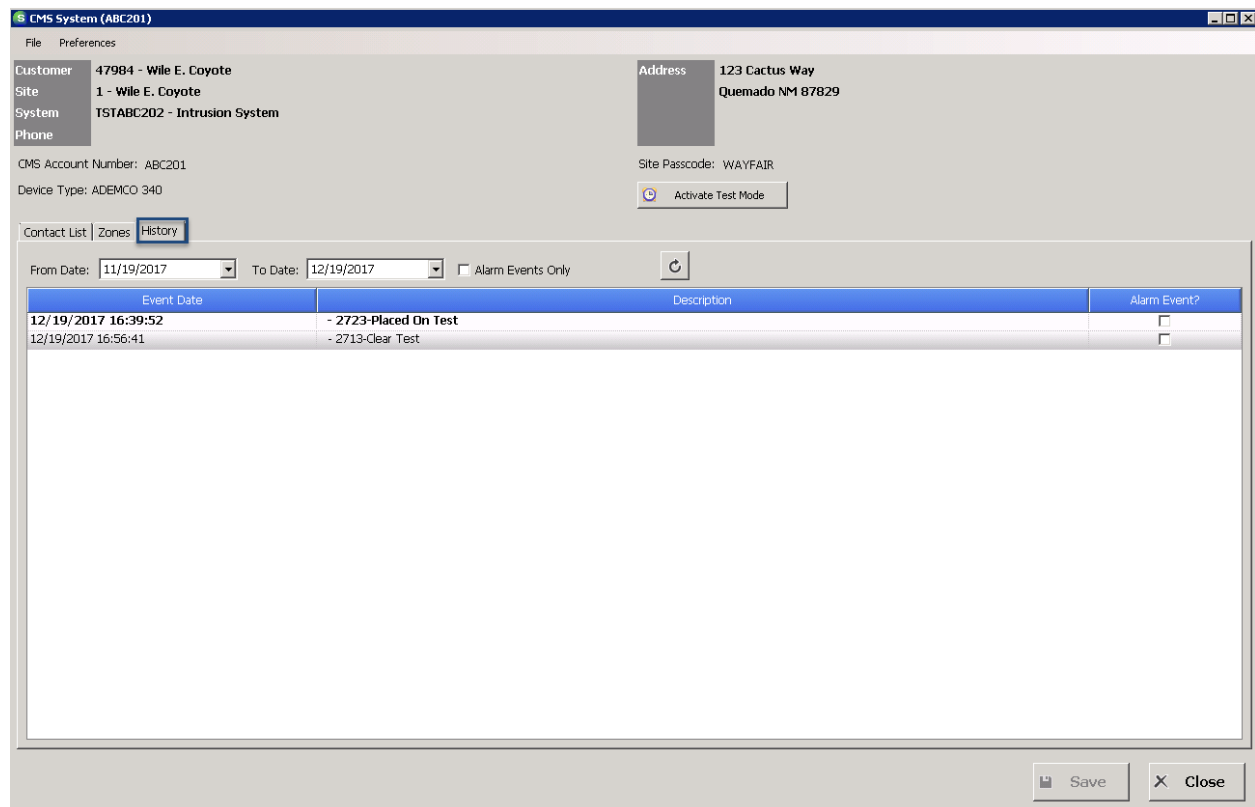
Order	First Name	Last Name	Phone 1	Ext 1	Phone 1 Type	Phone 2	Ext 2	Phone 2 Type	Passcode	Authority	Medical	Relationship
0	ROAD	RUNNER	(813) 555-1212		Home			Home	BEEP BEEP	Full Access	<input type="checkbox"/>	Corporate...
1	ELMER	FUDD	(734) 555-1212		Cell	(734) 555-2424		Home	RABBIT	Full Access	<input type="checkbox"/>	Facility

Deactivating Test Mode

Once testing has been completed, users may click on the Deactivate Test Mode button. Clicking this button sends a command to CMS to deactivate the test mode for the system. If this button is not pressed, the test will end after the elapse of time indicated for the test when test mode was activated. If the CMS form is open at the end of the test, the button will continue to display Deactivate Test mode until the user exits the form and comes back in.


Viewing System History

Test history may be viewed on a system by clicking on the System History button.



The screenshot shows the 'CMS System (ABC201)' window. The 'History' tab is selected. The 'From Date' is 11/19/2017 and the 'To Date' is 12/19/2017. The 'Alarm Events Only' checkbox is unchecked. The table below shows the test history:

Event Date	Description	Alarm Event?
12/19/2017 16:39:52	- 2723-Placed On Test	<input type="checkbox"/>
12/19/2017 16:56:41	- 2713-Clear Test	<input type="checkbox"/>

Users may enter a range of dates in which to review test history in the From and To date fields. The default is 30 days. Each time that history needs to be reviewed, the user should press the Refresh button  to ensure that the latest information is obtained.

Users can elect to only view alarm events by placing a checkmark in the box "Alarm Events Only" next to the From and To date fields.

General Ledger

Journal Entries

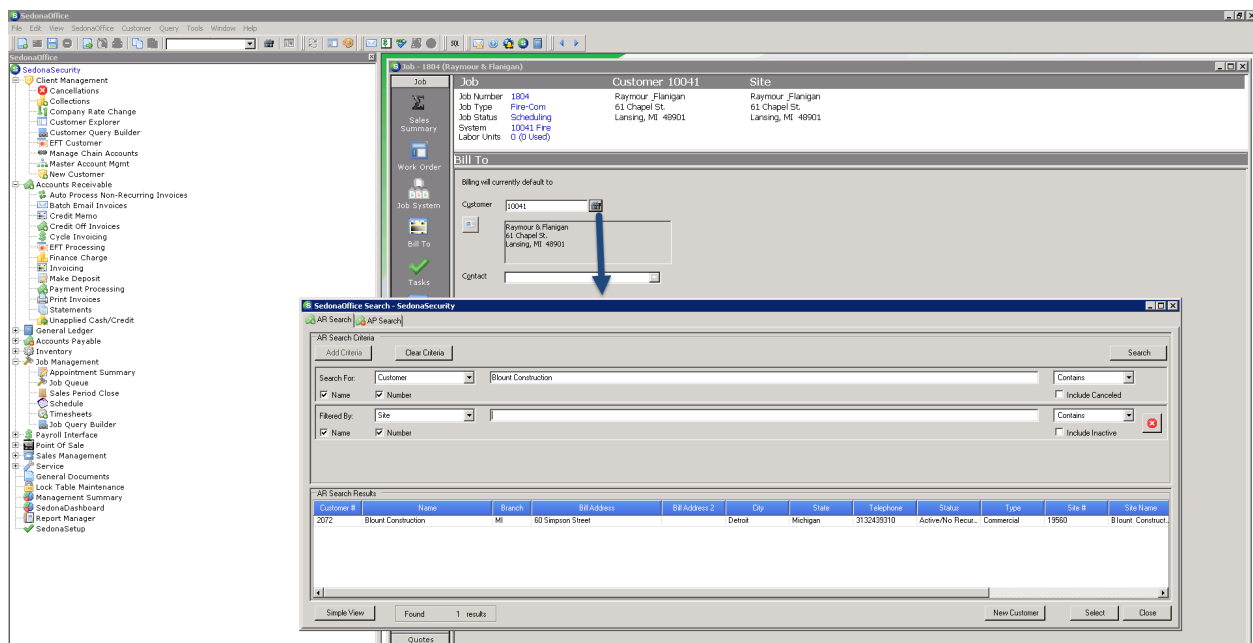
It is now possible to make a journal entry to a reversed job. This may be done either within the job itself or through the Journal Entry module within the General Ledger.

Jobs

Bill TOs – 3rd Party Addresses

Users often face a situation where the bills for a job need to go to a contractor or builder but the job itself needs to remain on the customer record. When this happens, ***it is important that the job be created under the customer's account, and that the contractor or builder be setup in your system under a different customer number.*** The bills for the job need to remain with the customer number assigned to the contractor— ***they should not be on your customer's account as they are not liable for payment of these bills.*** With this release, you will be able to have bills issued to the contractor under their customer number and keep the job with the customer.

When billing for the job needs to occur, the user should press the button next to Customer Number and select the customer number assigned to the 3rd party responsible for payment of this bill.



At the time that the invoice is created, it will be noted that it is being sent to a 3rd party.

Job Invoice

Customer Number: 10041 | Category: Jobs Com | AR Account: 110120 | Tax Group: MI-Wayne County

Job Invoice

Blount Construction
60 Simpson Street
Detroit, MI 48201

Site: Raymour & Flanigan
Address: 61 Chapel St.
Lansing, MI 48901

Billed to 3rd Party : 2072

☒ Bill RMR
RMR Reason: New RMR
Activation Date: 12/8/2017
Next Cycle Date: 01-Dec-17

Aging Date: 12/8/2017
Invoice Date: 12/8/2017
Invoice #: 414664
P.O. Number:
Job Number: 1804
Term: Due On Receipt
Salesperson: Miller Matt

Items \$2,500.00 | Parts \$0.00 | WIP MLOC | Custom Buckets

Item	Description	Exempt	Qty	Rate	Amount
Inst-Com-Fire	Install Fire System-Commercial	<input type="checkbox"/>	1	2500	2500.00

Description: Installation Services
Contact:
Memo:

Sub Total: 2500.00
Tax: 181.25
Total: 2681.25

☒ Add to Print Queue

Save Close

In the example above, billing will be made to Customer 2072 setup as Blount Construction. The bill for Blount Construction will be on their account, but a link to this bill will also be seen on Raymour & Flanigan indicating that a bill can be seen on another customer's account.

2072: Blount Construction ** Promise to Pay **

Blount Construction
60 Simpson Street
Detroit, MI 48201
(313) 243-9310

Balance Due: \$7,873.13
Last Statement Date: Never
* Promise to Pay * Over 30 Days Past Due
Total Active RMR :
Total Active RAR :
Customer Type: Commercial
Customer Since: 5/21/1989
Salesperson: Matt Miller
of Disp Last 30 Days: 0

Bill Contacts Title	Contact	Phone	Ext	E-Mail
Open Invoices	\$7,873.13			
Invoice #	Site Name	Description	Date	Amount
414661	Raymour & Flanigan	Installation Services	12/8/2017	\$2,681.25
469118	Pika Pan	Installation Services	10/9/2017	\$1,191.88
475631	Opti Mystic	Installation Services	12/3/2017	\$4,000.00

Here is the link to the bill belonging to Blount Construction which can be seen on Raymour and Flanigan's account:

10041 Raymour & Flanigan ** Do Not Extend Credit **

Raymour & Flanigan

- Customer Information
- Payment Options
- Bill To
 - Raymour & Flanigan
 - Contacts
- Sites
 - (25243) Raymour & Flanigan
 - Systems
 - Contacts
 - Credit Memos
 - Documents
 - Inspections
 - Invoices
 - Jobs
 - Notes
 - Recurring
 - Recurring History
 - Recurring Master Items
 - Service
 - Group Tickets
 - Activity Ledger
 - Aging
 - Collections
 - Contacts
 - Credit Memos
 - Credit Auto
 - Deferred Income (Unposted)
 - Documents
 - EFT History
 - Inner Office Message

Raymour & Flanigan
61 Chapel St.
Lansing, MI 48901

Balance Due: \$545.12
Last Statement Date: 9/7/2017
* Do Not Extend Credit * Over 120 Days Past Due
Total Active RMR : \$10.00
Total Active RAR : \$120.00
Customer Type: Commercial
Customer Since: 3/11/2004
Salesperson: Matt Miller
of Disp Last 30 Days 0

Bill Contacts						
Title	Contact	Phone	Ext	E-Mail		
	John Raymour	(734) 555-1212				
	Seymour Flanigan	(734) 625-1212				

Open Invoices \$545.12						
Invoice #	Site Name	Description	Date	Amount	Net Due	Late Fee
414733	Raymour & Flanigan	Service Call	4/10/2017	\$26.81	\$26.81	\$0.00
425222	Raymour & Flanigan	Installation Services	5/10/2017	\$10.10	\$10.10	\$0.00
431114	Raymour & Flanigan	Equipment Sales	6/1/2017	\$10.00	\$10.00	\$0.00
436958	Raymour & Flanigan	Recurring	7/1/2017	\$10.00	\$10.00	\$0.00
447095	Raymour & Flanigan	Recurring	8/1/2017	\$10.10	\$10.10	\$0.00
453521	Raymour & Flanigan	Recurring	9/1/2017	\$10.10	\$10.10	\$0.00
459549	Raymour & Flanigan	Recurring	10/1/2017	\$10.10	\$10.10	\$0.00
469188	Raymour & Flanigan	Recurring	11/1/2017	\$10.73	\$10.73	\$0.00
475605	Raymour & Flanigan	Service Call	11/21/2017	\$447.18	\$447.18	\$0.00

Other Cust Inv. \$2,681.25						
Invoice #	Site Name	Description	Date	Amount	Net Due	Late Fee
414661	Raymour & Flanigan	Installation Services	12/8/2017	\$2,681.25	\$2,681.25	\$0.00

Open Credits \$0.00						
Credit #	Site Name	Credit Type	Date	Amount	Balance	

Change Orders

Companies that will not be using Change Order Requests (see Enhancements below) will notice a change to the ability to edit change orders. Once a change order has been created, all previous change orders will be locked from further editing. In past releases, it was possible to edit the last positive change order as well as the last negative change order. This modification is being made intentionally to reduce issues that arose from the ordering and receipt of parts on change orders.

Change Order Requests

A new feature has been added to this release enabling a change order approval process to be in place. **Change Order Requests may be used by customers that do not import change orders from WeSuite or QuoteWerks.** This option is designed to provide a clear separation of duties between the individual requesting the change order and the person that has the authority to approve or reject it. While this process enables users to make change order modifications to installs, materials, and recurring, **it should be noted that commissions are not supported at this time.** Using this process enables users to submit both positive and negative changes within the same change order request. Sedona will not allow a job to be closed until all pending change orders have been approved or rejected.

Companies that do not require a clear separation of duties between those submitting change orders and those approving them should not turn on this feature.

Setup

Setup Processing

To turn on the change order approval process, the SedonaOffice Administrator should go into the Setup Processing for Jobs Module table and place a checkmark in the box "Job Change Approval Process."

The screenshot shows the 'Sedona Office Setup (SedonaSecurity)' window. On the left is a tree view of setup areas, with 'Setup Processing' selected under the 'JM' (Jobs Module) category. The main pane is titled 'Job Processing' and contains several tabs: 'Setup Processing', 'Custom Job Costing Buckets', and 'Define Initial View'. The 'Setup Processing' tab is active. It features a grid of setup items with checkboxes and dropdown menus. The 'Use Change Order Approval' checkbox is highlighted with a red box and is checked. Other visible settings include 'Material WIP' (122100), 'Jobs COGS' (510001), 'Labor To GL' (checked), 'Commissions To GL' (checked), 'Labor Expense Type' (Expense thru WIP), 'Commission Expense Type' (Expense thru WIP), 'Labor Expense' (510002), 'Commission Expense' (510003), 'Labor Deferred' (258100), 'Commission Deferred' (248100), 'Labor WIP' (122120), and 'Commission WIP' (122130). At the bottom right, there is an 'Apply' button.

Description	Area
Warranty Types	SV
Warehouses	IN
Vendors	AP
Vendor Types	AP
Users	OP
User Groups	OP
User Defined Table4	SM
User Defined Table3	SM
User Defined Table2	SM
User Defined Table1	SM
User Defined Setup	SM
UL Grade	CS
Type Of Customer	CM
Transmission Format	CS
Terms	AP
Terms	AR
Technicians	SV
Tax Tables	AR
Tax Groups	AR
Tax Agency	AP
System Types	CM
Status	SM
Statement Rules	AR
Signal Types	CS
Shipping Methods	AP
Setup Processing	AP
Setup Processing	AR
Setup Processing	JM
Setup Defaults	SV
Service Ticket Message	SV
Service Levels	SV
Service Companies	SV
Sedona Modules	OP
Scheduling and Appointments	SV
Sales Resolution Codes	SM
Sales Managers	SM

*Usergroup Permissions***Submitting Change Orders**

Users that need the ability to submit a change order for approval must be given the permission "Change Order Access."

Sedona Office Setup (SedonaSecurity)

File Find Find Next View Tools Help

Sedona Setup

Description	Area
Warehouses	IN
Vendors	AP
Vendor Types	AP
Users	OP
User Groups	OP
User Defined Table4	SM
User Defined Table3	SM
User Defined Table2	SM
User Defined Table1	SM
User Defined Setup	SM
UL Grade	CS
Type Of Customer	CM
Transmission Format	CS
Terms	AP
Terms	AR
Technicians	SV
Tax Tables	AR
Tax Groups	AR
Tax Agency	AP
System Types	CM
Status	SM
Statement Rules	AR
Signal Types	CS
Shipping Methods	AP
Setup Processing	AP
Setup Processing	AR
Setup Processing	JM
Setup Defaults	SV
Service Ticket Message	SV
Service Levels	SV
Service Companies	SV
Sedona Modules	OP
Scheduling and Appointments	SV
Sales Resolution Codes	SM
Sales Managers	SM
Sales Items	SM

User Groups

☐ User Groups

Group	Description	Level	Credit Limit
Accounting Clerk	Accounting Clerk	2	\$5,000.00
Admin	Admin	3	\$100,000.00
Admin Assistant	Admin Assistant	1	\$100.00
Administrator	Administrator	3	\$10,000.00
AP Query Only	AP Query Only	1	\$0.00
AR-Deb & Ruth	AR-Deb & Ruth	2	\$500.00
Data Entry Job	Data Entry Job	1	\$1.00
Dealers	Dealers	2	\$0.00
Dealers View	Dealers View with Notes	1	\$0.00

☐ Include Inactive

☒ User Group Edit ☐ Inactive

Code: Administrator Description: Administrator Level: 3 Credit Memo Limit: \$10,000,000.00

Application Access | Report Access

Access	Module
<input checked="" type="checkbox"/> Job Query Builder	JM
<input checked="" type="checkbox"/> Change Order Access	JM
<input checked="" type="checkbox"/> Change Order Approval	JM
<input checked="" type="checkbox"/> Close Job	JM
<input checked="" type="checkbox"/> Commissions Access	JM
<input checked="" type="checkbox"/> Force Close Job Ability	JM
<input checked="" type="checkbox"/> Invoicing	JM
<input checked="" type="checkbox"/> Job Costing	JM
<input checked="" type="checkbox"/> Job Costing Edit	JM
<input checked="" type="checkbox"/> Job Journal Entry	JM
<input checked="" type="checkbox"/> Job Log	JM
<input checked="" type="checkbox"/> Job Task Access	JM
<input checked="" type="checkbox"/> Job Task Remove Sign Off	JM

Print Apply New Delete

Users that will approve or reject change order requests must be given the permission “Change Order Approval” in the Jobs Module section of Usergroups.

Sedona Office Setup (SedonaSecurity)

File Find Find Next View Tools Help

Sedona Setup

Description	Area
Warehouses	IN
Vendors	AP
Vendor Types	AP
Users	OP
User Groups	OP
User Defined Table4	SM
User Defined Table3	SM
User Defined Table2	SM
User Defined Table1	SM
User Defined Setup	SM
UL Grade	CS
Type Of Customer	CM
Transmission Format	CS
Terms	AP
Terms	AR
Technicians	SV
Tax Tables	AR
Tax Groups	AR
Tax Agency	AP
System Types	CM
Status	SM
Statement Rules	AR
Signal Types	CS
Shipping Methods	AP
Setup Processing	AP
Setup Processing	AR
Setup Processing	JM
Setup Defaults	SV
Service Ticket Message	SV
Service Levels	SV
Service Companies	SV
Sedona Modules	OP
Scheduling and Appointments	SV
Sales Resolution Codes	SM
Sales Managers	SM
Sales Items	SM

User Groups

☐ User Groups

Group	Description	Level	Credit Limit
Accounting Clerk	Accounting Clerk	2	\$5,000.00
Admin	Admin	3	\$100,000.00
Admin Assistant	Admin Assistant	1	\$100.00
Administrator	Administrator	3	\$10,000.00
AP Query Only	AP Query Only	1	\$0.00
AR-Deb & Ruth	AR-Deb & Ruth	2	\$500.00
Data Entry Job	Data Entry Job	1	\$1.00
Dealers	Dealers	2	\$0.00
Dealers View	Dealers View with Notes	1	\$0.00

☐ Include Inactive

☒ User Group Edit ☐ Inactive

Code: Administrator Description: Administrator Level: 3 Credit Memo Limit: \$10,000,000.00

Application Access | Report Access

Access	Module
<input checked="" type="checkbox"/> Job Query Builder	JM
<input checked="" type="checkbox"/> Change Order Access	JM
<input checked="" type="checkbox"/> Change Order Approval	JM
<input checked="" type="checkbox"/> Close Job	JM
<input checked="" type="checkbox"/> Commissions Access	JM
<input checked="" type="checkbox"/> Force Close Job Ability	JM
<input checked="" type="checkbox"/> Invoicing	JM
<input checked="" type="checkbox"/> Job Costing	JM
<input checked="" type="checkbox"/> Job Costing Edit	JM
<input checked="" type="checkbox"/> Job Journal Entry	JM
<input checked="" type="checkbox"/> Job Log	JM
<input checked="" type="checkbox"/> Job Task Access	JM
<input checked="" type="checkbox"/> Job Task Remove Sign Off	JM

Print Apply New Delete

Creating a Change Order Request

The job must be locked in order to submit a change order request. The process for locking a job is the same as it is today. A checkmark must be placed in the “Sequence Locks Job” box on the specific task for which the change order is needed. The task is then approved.

Job - 1829 (Denise Gordon)

Job
Job Number: 1829
Job Type: ACC-Res
Job Status: Install Equipment
New System
Labor Units: 0 (0 Used)

Customer 35075
Gordon, Denise
166 Gulf Rd
Plymouth, MI 48170
(734) 992-1404

Site
Denise Gordon
166 Gulf Rd
Plymouth, MI 48170
(734) 992-1404

Tasks

#	Phase	Task	Job Status	Invoice	Approved	Approve...	Comments	Schedule	Last Tech	Last Dispatch	Labor Hours
1	Phase 01	Order Parts	Parts	N	N	11/28/2017 9:27:39 AM	Administ...				1
2	Phase 01	Schedule	Scheduling	N	N	11/28/2017 9:27:40 AM	Administ...				1
3	Phase 01	Lock For CO	CO Approval	N	Y	11/28/2017 9:27:42 AM	Administ...				0
4	Phase 01	Install	Install Equipment	Y	N						1
5	Phase 01	Jobcost	Jobcost	N	N						1

*The job will be locked and the status will be set to Job Complete when all tasks in the job are approved.

Job Task: Lock For CO
Job Status: CO Approval
Phase Code: Phase 01
Labor Hours: 0
Schedule Date:
☐ Invoice

☒ Sequence Locks Job

Comments:

Buttons: Save, New, Remove, Apply Template, Apply

In the Tools section, a new button will be added entitled “Request Change Order.”

Job - 1829 (Denise Gordon)

Job
Job Number: 1829
Job Type: ACC-Res
Job Status: Install Equipment
New System
Labor Units: 0 (0 Used)

Customer 35075
Gordon, Denise
166 Gulf Rd
Plymouth, MI 48170
(734) 992-1404

Site
Denise Gordon
166 Gulf Rd
Plymouth, MI 48170
(734) 992-1404

Log

Date	CO	Event	Description	User
11/28/2017 9:27:44 AM	N	Changed Job Locked Flag	Job is locked, before Task Signoffs	Administrator
11/28/2017 9:27:44 AM	N	Approved Job Task	1 Phase 01	Administrator
11/28/2017 9:27:44 AM	N	Approved Job Task	2 Phase 01	Administrator
11/28/2017 9:27:44 AM	N	Added Job Task	Lock For CO	Administrator
11/28/2017 9:27:44 AM	N	Changed Job Locked Flag	Job is locked, after Task Signoffs	Administrator
11/28/2017 9:24:06 AM	N	Deleted Install Charge	Job Part RSC	Administrator
11/28/2017 9:23:15 AM	N	Added Install Charge	Install Access RSC	Administrator
11/28/2017 9:23:15 AM	N	Added Install Charge	Job Part RSC	Administrator
11/28/2017 9:22:03 AM	N	Added New Job System	New Job System	Administrator
11/28/2017 9:18:53 AM	N	New Job	Added Job 1829	Administrator

Tools
Log
Notes
Invoicing
Issue Parts
Request Change Order
Journal Entry

Click on Request Change Order to open the Change Order Request form.

The Change Order Request form consists of two parts. Information about what is being added to or removed from the job, and the date that the job scope changed is entered into the Job Information tab.

Change Order Job: 1829 Customer: 35075-Gordon, Denise Site: Gordon, Denise

Job 1829		Customer 35075	Site
Job Type	ACC-Res	Gordon, Denise	Gordon, Denise
Job Status	Install Equipment	166 Gulf Rd	166 Gulf Rd
CO Status	In Process	Plymouth, MI 48170 (734) 992-1404	Plymouth, MI 48170 (734) 992-1404

Job Information | Change Order Components

Job Number (1829) Tax Group MI-Wayne County
Description Access - Residential Branch MI
Sold Date 11/28/2017 Install Company MI
Project Manager N/A
Installer PO Number
Salesperson Matt.Miller
Projected Start Projected End
☐ Permits Required
Permit 1
Permit 2
Permit 3
Notes (63 characters remaining)
Add (1) HID1346 key fob per customer request and signed authorization. \$65.00 sales price. Reduce parts pricing due to removal of one (1) EVDW-4917 per request of customer. Add recurring.

Installs Change: \$65.00 Recurring Change: \$25.00 Materials Change: No Change

Requested By Administrator
Requested On 11/28/2017 11:49 AM

Delete Submit Save Close

The specific items (installs, materials, and recurring items) that are to be added or removed are entered in the tab entitled Change Order Components.

Change Order Job: 1829 Customer: 35075-Gordon, Denise Site: Gordon, Denise

Job 1829		Customer 35075	Site
Job Type	ACC-Res	Gordon, Denise	Gordon, Denise
Job Status	Install Equipment	166 Gulf Rd	166 Gulf Rd
CO Status	New	Plymouth, MI 48170 (734) 992-1404	Plymouth, MI 48170 (734) 992-1404

Job Information **Change Order Components**

Installs | Recurring | Materials




Additions | Reversals

☐ Show All Install Items (Job and COs) ☐ Show Phases Auto-size Columns ☐

Job	Item	Description	Quantity	Change	Unit Price	Tax Exe	Extended	Labor Unit	Change	Cost Typ
						<input checked="" type="checkbox"/>				

Installs Change: No Change Recurring Change: No Change Materials Change: No Change

Requested By Sedona Master
Requested On 11/28/2017

 Submit  Save  Close

Change Order Components Form

A change order request may consist of additions to a job (Install Items, Recurring Items, or Materials):

Change Order Job: 1829 Customer: 35075-Gordon, Denise Site: Gordon, Denise

Job 1829	Customer 35075	Site
Job Type ACC-Res	Gordon, Denise	Gordon, Denise
Job Status Install Equipment	166 Gulf Rd	166 Gulf Rd
CO Status New	Plymouth, MI 48170	Plymouth, MI 48170
	(734) 992-1404	(734) 992-1404

Job Information | Change Order Components

Installs | Recurring | Materials

Additions | Reversals

☒ Show All Install Items (Job and COs)

☒ Show Phases

Auto-size Columns ☐

Job	Phase	Item	Description	Quantity	Change	Unit Price	Tax Ex	Extended	Labor Unit	Change
1829	Phase 01	Install Acces...	Install Access System	1	0.00	\$5,000.00	<input type="checkbox"/>	\$0.00	0.00	0.00

Installs Change: No Change

Recurring Change: No Change

Materials Change: No Change

Requested By Sedona Master

Requested On 11/28/2017

Submit

Save

Close

The Change Order Request may also consist of the reversal of items already on the job (Install Items, Recurring, or Materials) within the same request.

Change Order Job: 1829 Customer: 35075-Gordon, Denise Site: Gordon, Denise

Job 1829		Customer 35075	Site
Job Type	ACC-Res	Gordon, Denise	Gordon, Denise
Job Status	Install Equipment	166 Gulf Rd	166 Gulf Rd
CO Status	New	Plymouth, MI 48170	Plymouth, MI 48170
		(734) 992-1404	(734) 992-1404

Job Information | Change Order Components

Installs | Recurring | Materials

Additions | Reversals




☒ Show All Install Items (Job and COs) ☒ Show Phases Auto-size Columns ☐

Job	Phase	Item	Description	Quantity	Change	Unit Price	Tax Ex	Extended	Labor Unit	Change
1829	Phase 01	Install Acces...	Install Access System	1	0.00	\$5,000.00	<input type="checkbox"/>	\$0.00	0.00	0.00

Installs Change: No Change Recurring Change: No Change Materials Change: No Change

Requested By Sedona Master

Requested On 11/28/2017

 Submit  Save  Close

As items are added and/or reversed, a running total of changes to Installs, Recurring, and Materials is displayed at the bottom of the screen.

Change Order Job: 1829 Customer: 35075-Gordon, Denise Site: Gordon, Denise

Job 1829	Customer 35075	Site
Job Type ACC-Res	Gordon, Denise	Gordon, Denise
Job Status Install Equipment	166 Gulf Rd	166 Gulf Rd
CO Status New	Plymouth, MI 48170	Plymouth, MI 48170
	(734) 992-1404	(734) 992-1404

Job Information

Change Order Components

Installs

Recurring

Materials

Additions

Reversals

☒ Show All Install Items (Job and COs)☒ Show PhasesAuto-size Columns ☐

Item	Description	Quantity	Change	Unit Price	Tax Exe	Extended	Labor Unit	Change	Cost Typ	Cost
Job Part RSC	Job Part	0	1.00	\$65.00	<input type="checkbox"/>	\$65.00	0.00	0.00	O	\$0.00
Install Acces...	Install Access System	1	0.00	\$5,000.00	<input type="checkbox"/>	\$0.00	0.00	0.00	O	\$0.00

Installs Change: \$65.00

Recurring Change: No Change

Materials Change: No Change

Requested By Sedona Master

Requested On 11/28/2017

Submit

Save

Close

Additions of Install Items

When the Change Order Components form is first opened, it defaults to the Addition of Install items.

Users may display the install items already defined on the job (and their phase codes), by placing a checkmarks in the boxes "Show All Install Items (Job and CO)" and Show Phases.

Change Order Job: 1829 Customer: 35075-Gordon, Denise Site: Gordon, Denise

Job	Phase	Item	Description	Quantity	Change	Unit Price	Tax Ex	Extended	Labor Unit	Change
1829	Phase 01	Install Acces...	Install Access System	1	0.00	\$5,000.00	<input type="checkbox"/>	\$0.00	0.00	0.00

Installs Change: No Change Recurring Change: No Change Materials Change: No Change

Requested By: Sedona Master
Requested On: 11/28/2017

Submit Save Close

To add a new install item, place the cursor in the Item column.

Change Order Job: 1829 Customer: 35075-Gordon, Denise Site: Gordon, Denise

Job 1829		Customer 35075	Site
Job Type	ACC-Res	Gordon, Denise	Gordon, Denise
Job Status	Install Equipment	166 Gulf Rd	166 Gulf Rd
CO Status	New	Plymouth, MI 48170 (734) 992-1404	Plymouth, MI 48170 (734) 992-1404

Job Information | Change Order Components

Installs | Recurring | Materials

Additions | Reversals

☒ Show All Install Items (Job and COs) ☒ Show Phases Auto-size Columns ☐

Job	Phase	Item	Description	Quantity	Change	Unit Price	Tax Ex	Extended	Labor Unit	Change
1829	Phase 01	Install Acces...	Install Access System	1	0.00	\$5,000.00	<input type="checkbox"/>	\$0.00	0.00	0.00

Installs Change: No Change Recurring Change: No Change Materials Change: No Change

Requested By: Sedona Master
Requested On: 11/28/2017

Submit Save Close

Select the Install Item that should be added from the drop-down list.

Change Order Job: 1829 Customer: 35075-Gordon, Denise Site: Gordon, Denise

Job 1829		Customer 35075		Site	
Job Type	ACC-Res	Gordon, Denise		Gordon, Denise	
Job Status	Install Equipment	166 Gulf Rd		166 Gulf Rd	
CO Status	New	Plymouth, MI 48170 (734) 992-1404		Plymouth, MI 48170 (734) 992-1404	

Job Information | Change Order Components

Installs | Recurring | Materials

Additions | Reversals

☒ Show All Install Items (Job and COs) ☒ Show Phases Auto-size Columns ☐

Job	Phase	Item	Description	Quantity	Change	Unit Price	Tax Exe	Extended	Labor Unit	Change
1829	Phase 01			0	0.00	\$0.00		\$0.00	0.00	0.00
1829	Phase 01									
		Item	Description	Rate	Cost Type	Default Cost		\$0.00	0.00	0.00
		Add-Ons	Add-On to System	\$0.00	0	\$0.00				
		Install Access RSC	Install Access System	\$0.00	0	\$0.00				
		Job Labor LCOM	Job Labor-Commercial	\$0.00	0	\$0.00				
		Job Labor P&S	Job Labor-Parts & Smarts	\$2.00	0	\$10.00				
		Job Part RSC	Job Part	\$0.00	0	\$0.00				
		Job Parts 2	Job Parts 2	\$10.00	0	\$0.00				
		Job Travel LCOM	Job Travel-Commercial	\$0.00	0	\$0.00				

Installs Change: No Change Recurring Change: No Change Materials Change: No Change

Requested By: Sedona Master
Requested On: 11/28/2017

Submit Save Close

Enter the quantity needed by either selecting the up arrow or manually typing the quantity needed into the Change box to the right of the quantity column..

Change Order Job: 1829 Customer: 35075-Gordon, Denise Site: Gordon, Denise

Job 1829	Customer 35075	Site
Job Type ACC-Res	Gordon, Denise	Gordon, Denise
Job Status Install Equipment	166 Gulf Rd	166 Gulf Rd
CO Status New	Plymouth, MI 48170	Plymouth, MI 48170
	(734) 992-1404	(734) 992-1404

Job Information Change Order Components

Installs Recurring Materials

Additions Reversals

☒ Show All Install Items (Job and COs) ☒ Show Phases Auto-size Columns ☐

Job	Phase	Item	Description	Quantity	Change	Unit Price	Tax Exe	Extended	Labor Unit	Change
1829	Phase 01	Job Part RSC	Job Part	0	0.00	\$0.00	<input type="checkbox"/>	\$0.00	0.00	0.00
1829	Phase 01	Install Access R...	Install Access System	1	0.00	\$3,000.00	<input type="checkbox"/>	\$0.00	0.00	0.00

Enter the Unit Price of this item by typing it into the Unit Price box.

Change Order Job: 1829 Customer: 35075-Gordon, Denise Site: Gordon, Denise

Job 1829	Customer 35075	Site
Job Type ACC-Res	Gordon, Denise	Gordon, Denise
Job Status Install Equipment	166 Gulf Rd	166 Gulf Rd
CO Status New	Plymouth, MI 48170	Plymouth, MI 48170
	(734) 992-1404	(734) 992-1404

Job Information Change Order Components

Installs Recurring Materials

Additions Reversals

☒ Show All Install Items (Job and COs) ☒ Show Phases Auto-size Columns ☐

Job	Phase	Item	Description	Quantity	Change	Unit Price	Tax Ex	Extended	Labor Unit	Change
1829	Phase 01	Job Part RSC	Job Part	0	1.00	\$65.00	<input type="checkbox"/>	\$65.00	0.00	0.00
1829	Phase 01	Install Access R...	Install Access System	1	0.00	\$5,000.00	<input type="checkbox"/>	\$0.00	0.00	0.00

Installs Change: No Change Recurring Change: No Change Materials Change: No Change

Requested By Sedona Master
Requested On 11/28/2017

Submit Save Close

If your company has elected to turn on line item tax exemptions (see Tax Exempt Line Item Setup under Accounts Receivable in this section of Enhancements), a Tax Exempt box will be displayed. Place a checkmark in this box if this line item is part of a capital improvement project or other scenario where tax needs to be removed. Customers that have not turned on Tax Exempt Line Items will not see this column displayed.

S Change Order Job: 1829 Customer: 35075-Gordon, Denise Site: Gordon, Denise

Job 1829		Customer 35075		Site	
Job Type	ACC-Res	Gordon, Denise		Gordon, Denise	
Job Status	Install Equipment	166 Gulf Rd		166 Gulf Rd	
CO Status	New	Plymouth, MI 48170 (734) 992-1404		Plymouth, MI 48170 (734) 992-1404	

Job Information | Change Order Components |

Installs | Recurring | Materials |

Additions | Reversals |

☒ Show All Install Items (Job and COs) ☒ Show Phases Auto-size Columns: ☐

Item	Description	Quantity	Change	Unit Price	Tax Exe	Extended	Labor Unit	Change	Cost Typ	Cost
Job Part RSC	Job Part	0	1.00	\$65.00	<input type="checkbox"/>	\$65.00	0.00	0.00	O	\$0.00
Install Access...	Install Access System	1	0.00	\$5,000.00	<input type="checkbox"/>	\$0.00	0.00	0.00	O	\$0.00

Installs Change: \$65.00 Recurring Change: No Change Materials Change: No Change

Requested By: Sedona Master
Requested On: 11/28/2017

Submit Save Close

Using either the up arrow or manually typing, enter the number of labor units needed for this new install item in the Change column to the right of the Labor Unit column.

Change Order Job: 1829 Customer: 35075-Gordon, Denise Site: Gordon, Denise

Job 1829	Customer 35075	Site
Job Type ACC-Res	Gordon, Denise	Gordon, Denise
Job Status Install Equipment	166 Gulf Rd	166 Gulf Rd
CO Status New	Plymouth, MI 48170	Plymouth, MI 48170
	(734) 992-1404	(734) 992-1404

Job Information Change Order Components

Installs Recurring Materials

Additions Reversals

☒ Show All Install Items (Job and COs) ☒ Show Phases Auto-size Columns ☐

Item	Description	Quantity	Change	Unit Price	Tax Exe	Extended	Labor Unit	Change	Cost Typ	Cost
Job Part RSC	Job Part	0	1.00	\$65.00	<input type="checkbox"/>	\$65.00	0.00	1.00	0	\$0.00
Install Access R...	Install Access System	1	0.00	\$5,000.00	<input type="checkbox"/>	\$0.00	0.00	0.00	0	\$0.00

Installs Change: \$65.00 Recurring Change: No Change Materials Change: No Change

Requested By Sedona Master
Requested On 11/28/2017

Submit Save Close

Select the Job Cost Expense Type that should be associated with this install item from the drop-down list in the Cost Type column.

Change Order Job: 1829 Customer: 35075-Gordon, Denise Site: Gordon, Denise

Job 1829		Customer 35075		Site	
Job Type	ACC-Res	Gordon, Denise		Gordon, Denise	
Job Status	Install Equipment	166 Gulf Rd		166 Gulf Rd	
CO Status	New	Plymouth, MI 48170		Plymouth, MI 48170	
		(734) 992-1404		(734) 992-1404	

Job Information | Change Order Components

Installs | Recurring | Materials

Additions | Reversals

☒ Show All Install Items (Job and COs) ☒ Show Phases Auto-size Columns ☐

Item	Description	Quantity	Change	Unit Price	Tax Ex	Extended	Labor Unit	Change	Cost Type	Cost
Job Part RSC	Job Part	0	1.00	\$65.00	<input type="checkbox"/>	\$65.00	0.00	1.00	0	\$0.00
Install Access R...	Install Access System	1	0.00	\$5,000.00	<input type="checkbox"/>	\$0.00	0.00	0.00		

Cost Type

Cost Type	Description
AQ	Miscellaneous Expense
C	Commission
E	Engineering/Drafting
ER	Equipment Rentals
F	Freight
L	Labor
M	Material
O	Other

Installs Change: \$65.00 Recurring Change: No Change Materials Change: No Change

Requested By Sedona Master
Requested On 11/28/2017

Submit Save Close

Press Save once all information has been entered for this line item. The total amount of install items on this change order request is updated at the bottom of the screen.

Change Order Job: 1829 Customer: 35075-Gordon, Denise Site: Gordon, Denise

Job 1829		Customer 35075	Site
Job Type	ACC-Res	Gordon, Denise	Gordon, Denise
Job Status	Install Equipment	166 Gulf Rd	166 Gulf Rd
CO Status	New	Plymouth, MI 48170 (734) 992-1404	Plymouth, MI 48170 (734) 992-1404

Job Information | Change Order Components

Installs | Recurring | Materials




Additions | Reversals

☒ Show All Install Items (Job and COs) ☒ Show Phases Auto-size Columns ☐

Job	Phase	Item	Description	Quantity	Change	Unit Price	Tax Exe	Extended	Labor Unit	Change
1829	Phase 01	Job Part RSC	Job Part	0	1.00	\$65.00	<input type="checkbox"/>	\$65.00	0.00	1.00
1829	Phase 01	Install Access R...	Install Access System	1	0.00	\$5,000.00	<input type="checkbox"/>	\$0.00	0.00	0.00

Installs Change: \$65.00 Recurring Change: No Change Materials Change: No Change

Requested By Sedona Master
Requested On 11/28/2017

 Submit  Save  Close

More line items may be added by placing the cursor into the Item column again.

Additions of Recurring Items

Additions of recurring items may be made by clicking on the Recurring tab and placing the cursor in the Item column.

Change Order Job: 1829 Customer: 35075-Gordon, Denise Site: Gordon, Denise

Job 1829	Customer 35075	Site
Job Type ACC-Res	Gordon, Denise	Gordon, Denise
Job Status Install Equipment	166 Gulf Rd	166 Gulf Rd
CO Status New	Plymouth, MI 48170	Plymouth, MI 48170
	(734) 992-1404	(734) 992-1404

Job Information Change Order Components

Installs Recurring Materials

Additions Reversals

Auto-size Columns ☐

Job	Item	Description	Sub Item Of	Bill Cycle	Cycle Start	RMR Amou	Cycle Amou
-----	------	-------------	-------------	------------	-------------	----------	------------

Installs Change: \$65.00 Recurring Change: No Change Materials Change: No Change

Requested By Sedona Master

Requested On 11/28/2017

Submit Save Close

Select the recurring item which needs to be added to the change order from the drop-down list.

Change Order Job: 1829 Customer: 35075-Gordon, Denise Site: Gordon, Denise

Job 1829	Customer 35075	Site
Job Type	ACC-Res	Gordon, Denise
Job Status	Install Equipment	166 Gulf Rd
CO Status	New	Plymouth, MI 48170
	(734) 992-1404	(734) 992-1404

Job Information | Change Order Components

Installs | **Recurring** | Materials

Additions | Reversals




Auto-size Columns ☐

Job	Item	Description	Sub Item Of	Bill Cycle	Cycle Start	RMR Amou	Cycle Amou
1829						\$0.00	\$0.00
	Item	Description					
	Discount for Annual Pay	Discount for Annual Payme				\$0.00	
	Elevator Inspection	Elevator Inspection				\$0.00	
	Intrusion Monitoring	502				\$0.00	
	Lease	Equipment/System Lease				\$0.00	
	MON-Taxable	Monitoring				\$0.00	
	Permit	Permit				\$0.00	
	Service Agreement	Service Contract				\$0.00	

Installs Change: \$65.00 Recurring Change: No Change Materials Change: No Change

Requested By Sedona Master

Requested On 11/28/2017

 **Submit**  **Save**  **Close**

Enter the billing cycle, cycle start date (if known) and the cycle amount in the appropriate columns.

If your company has elected to turn on line item tax exemptions (see Tax Exempt Line Item Setup under Accounts Receivable in this section of Enhancements), a Tax Exempt box will be displayed. Place a checkmark in this box if this line item is part of a capital improvement project or other scenario where tax needs to be removed. Customers that have not turned on Tax Exempt Line Items will not see this column displayed.

Press Save to add the new recurring to the change order. The total amount of recurring currently on this change order request is displayed at the bottom of the screen.

Change Order Job: 1829 Customer: 35075-Gordon, Denise Site: Gordon, Denise

Job 1829		Customer 35075	Site
Job Type	ACC-Res	Gordon, Denise	Gordon, Denise
Job Status	Install Equipment	166 Gulf Rd	166 Gulf Rd
CO Status	New	Plymouth, MI 48170 (734) 992-1404	Plymouth, MI 48170 (734) 992-1404

Job Information | Change Order Components

Installs | Recurring | Materials

Additions | Reversals

Item	Description	Sub Item Of	Bill Cycle	Cycle Start	RMR Amou	Cycle Amou	Tax Exempt
Intrusion Monitoring	502		Monthly	12/01/2017	\$25.00	\$25.00	<input type="checkbox"/>

Auto-size Columns ☐

Installs Change: \$65.00 Recurring Change: \$25.00 Materials Change: No Change

Requested By: Administrator
Requested On: 11/28/2017 4:49 PM

Delete Submit Save Close

Additions of Materials

Additions to the materials list is made by clicking on the Materials tab and placing the cursor in the Part column.

The screenshot shows the 'Change Order' window for Job 1829, Customer 35075-Gordon, Denise, and Site: Gordon, Denise. The window is divided into several sections:

- Job Information:** Displays Job Type (ACC-Res), Job Status (Install Equipment), CO Status (New), Customer (Gordon, Denise), and Site (Gordon, Denise).
- Change Order Components:** Contains tabs for Installs, Recurring, Materials, Additions, and Reversals. The 'Materials' tab is selected.
- Table:** A table with columns: Job, Part, Description, Vendor, Quantity, Change, Unit Price, Tax Ex, Location, Local Zone, Labor Unit, and a checkbox. A blue arrow points to the 'Part' column header.
- Summary:** Shows 'Installs Change: \$65.00', 'Recurring Change: \$25.00', and 'Materials Change: No Change'.
- Footer:** Includes 'Requested By: Administrator', 'Requested On: 11/28/2017 4:49 PM', and buttons for Delete, Submit, Save, and Close.

Click on the binoculars to open the part search.

Change Order
Job: 1829
Customer: 35075-Gordon, Denise
Site: Gordon, Denise

Job 1829
Customer 35075
Site

Job Type ACC-Res
Job Status Install Equipment
CO Status New

Gordon, Denise
166 Gulf Rd
Plymouth, MI 48170
(734) 992-1404

Gordon, Denise
166 Gulf Rd
Plymouth, MI 48170
(734) 992-1404

Job Information
Change Order Components

Installs
Recurring
Materials

Additions
Reversals

☐ Show All Parts (Job and COs)
☐ Show Phases
Auto-size Columns ☐

Job	Part	Description	Vendor	Quantity	Change	Unit Price	Tax Exe	Location	Local Zone	Labor Unit
1829				0	0	\$0.00	<input type="checkbox"/>			0.00

Installs Change: \$65.00
Recurring Change: \$25.00
Materials Change: No Change

Requested By Administrator
Requested On 11/28/2017 4:49 PM

Delete
Submit
Save
Close

Change Order
Job: 1829
Customer: 35075-Gordon, Denise
Site: Gordon, Denise

Job 1829
Customer 35075
Site

Job Type ACC-Res
Job Status Install Equipment
CO Status New

Gordon, Denise
166 Gulf Rd
Plymouth, MI 48170
(734) 992-1404

Gordon, Denise
166 Gulf Rd
Plymouth, MI 48170
(734) 992-1404

Job Information
Change Order Components

Installs
Recurring
Materials

Additions
Reversals

☐ Show All Parts (Job and COs)
☐ Show Phases
Auto-size Columns ☐

Job	Part	Description	Vendor	Quantity	Change	Unit Price	Tax Exe	Location	Local Zone	Labor Unit
1829				0	0	\$0.00	<input type="checkbox"/>			0.00

Installs Change:
Recurring Change:
Materials Change:

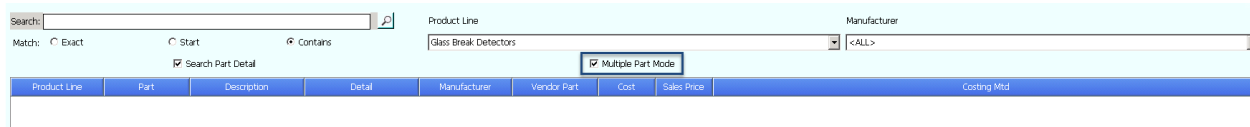
Requested By Administrator
Requested On 11/28/2017 4:49 PM

Delete
Submit
Save
Close

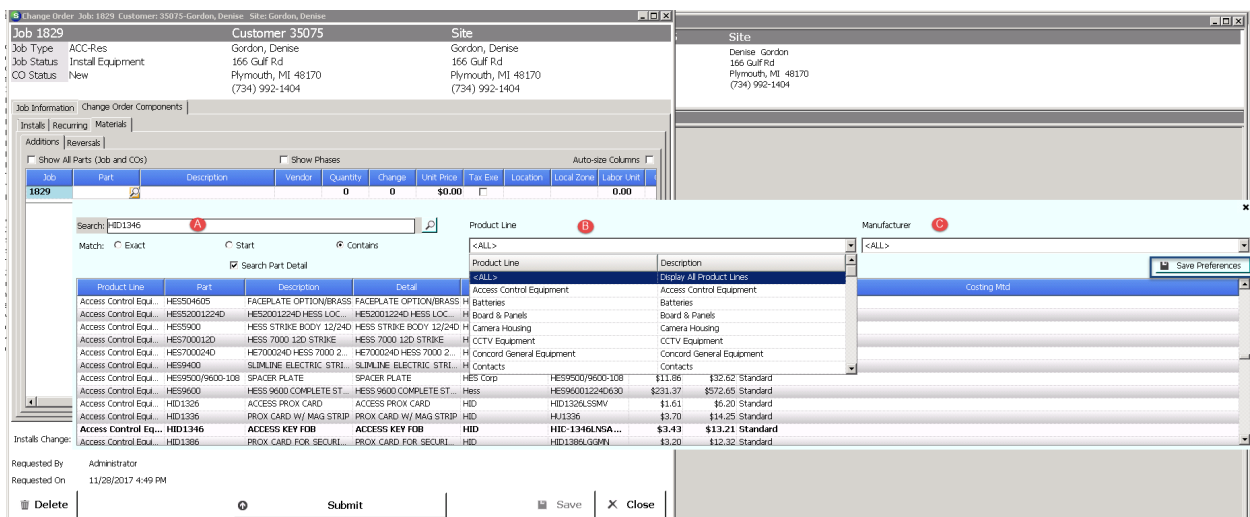
Search:
Match: ☐ Exact ☐ Start ☒ Contains
Product Line Glass Break Detectors
Manufacturer <CALL>
☐ Search Part Detail
☐ Multiple Part Mode

Product Line	Part	Description	Detail	Manufacturer	Vendor Part	Cost	Sales Price	Conting Mtd
--------------	------	-------------	--------	--------------	-------------	------	-------------	-------------

Parts may be added either individually or by using multiple part mode. If more than one part will be added to this change order, place a checkmark into the multiple part mode checkbox. This will enable multiple parts to be added without having to reopen the search screen.



Part searches may be conducted by either entering the name of the part in the Search field (A), entering the product line (B), and/or selecting the manufacturer (C). Your preferences on how to conduct the search can be saved by selecting on “Save Preferences”



Reversal of Install Items

Install line items may be removed from the job by entering a negative quantity in the change column. If a line item exists on a job with a quantity of 1, entering -1 in a Change Request will remove the line item completely off of the job.

Reductions to the price of an install line item are made by entering negative quantities proportionate to the dollar reduction needed. For example, if a \$5,000 line item needs to be reduced by \$500.00, entering -0.10 (10 percent) into the quantity column will make a \$500.00 reversal.

The net of all additions and reversals for install items on the change order request will be updated in the lower left hand corner of the screen.

Change Order Job: 1829 Customer: 35075-Gordon, Denise Site: Gordon, Denise

Job	1829	Customer	35075	Site	
Job Type	ACC-Res	Gordon, Denise		Gordon, Denise	
Job Status	Install Equipment	166 Gulf Rd		166 Gulf Rd	
CO Status	In Process	Plymouth, MI 48170		Plymouth, MI 48170	
		(734) 992-1404		(734) 992-1404	

Job Information | Change Order Components

Installs | Recurring | Materials

Additions | Reversals

☐ Show Phases ☐ Auto-size Columns

Job	Item	Description	Quantity	Change	Unit Price	Tax Exem	Extended	Labor Unit	Change	Cost Typ
1829	Install Acces...	Install Access System	1	-0.10	\$5,000.00	<input type="checkbox"/>	(\$500.00)	0.00	0.00	0

Installs Change: (\$435.00) Recurring Change: \$25.00 Materials Change: No Change

Requested By: Administrator
Requested On: 11/28/2017 11:49 AM

Reversal of Recurring Items

The reversal or reduction in price for recurring items is made on the Reversals Recurring tab.

Change Order Job: 1829 Customer: 35075-Gordon, Denise Site: Gordon, Denise

Job 1829	Customer 35075	Site
Job Type ACC-Res	Gordon, Denise	Gordon, Denise
Job Status Install Equipment	166 Gulf Rd	166 Gulf Rd
CO Status In Process	Plymouth, MI 48170	Plymouth, MI 48170
	(734) 992-1404	(734) 992-1404

Job Information Change Order Components

Installs **Recurring** Materials

Additions **Reversals**





Job	Item	Description	Sub Item Of	Bill Cycle	Cycle Start	RMR Amou	Change RM
-----	------	-------------	-------------	------------	-------------	----------	-----------

Auto-size Columns ☐

Installs Change: (\$435.00) Recurring Change: \$25.00 Materials Change: No Change

Requested By Administrator

Requested On 11/28/2017 11:49 AM

 Delete  Submit  Save  Close

Reversal of Material Items

Parts may be removed from the Materials List by entering a negative quantity in the Change field next to part. After selecting the items to be removed, press the Save key in the lower right hand corner of the screen.

Change Order Job: 1829 Customer: 35075-Gordon, Denise Site: Gordon, Denise

Job 1829	Customer 35075	Site
Job Type ACC-Res	Gordon, Denise	Gordon, Denise
Job Status Install Equipment	166 Gulf Rd	166 Gulf Rd
CO Status In Process	Plymouth, MI 48170 (734) 992-1404	Plymouth, MI 48170 (734) 992-1404

Job Information Change Order Components

Installs Recurring **Materials**

Additions **Reversals**

☐ Show Phases
Auto-size Columns ☐

Job	Part	Description	Vendor	Quantity	Change	Unit Price	Tax Exe	Location	Local Zone	Labor Unit
1829	470PB	LOW TEMP PROBE TO 5821	Communi...	1	0	\$0.00	<input type="checkbox"/>			0.00
1829	AIPJKS1AD	AIPHONE VIDEO INTRCOM KIT	Communi...	1	0	\$0.00	<input type="checkbox"/>			0.00
1829	EVDW-4917	EVDW-4917	ADI	1	-1	\$0.00	<input type="checkbox"/>			0.00
1829	HID1346	ACCESS KEY FOB	Bosch Se...	1	0	\$0.00	<input type="checkbox"/>			0.00
1829	HONFG1625SN	V-PLEX GLASSBREAK DETECTOR	Communi...	1	0	\$0.00	<input type="checkbox"/>			0.00
1829	WLS-914-433	WIRELESS PIR MOTION DET. WI...	ATL	1	0	\$0.00	<input type="checkbox"/>			0.00

Installs Change: (\$435.00)
Recurring Change: \$25.00
Materials Change: No Change

Requested By Administrator
Requested On 11/28/2017 11:49 AM

Delete Submit Save Close

Note: Companies that charge their customers for every part used on the job will not be able to reduce the price of the part through a negative change order. The part must be removed from the job at its old price on the change order and re-added again at its new price.

Editing the Change Order Request

Change Order Request Components may be edited up until their submission for approval. All additions/reversal of items may be reviewed at any time by selecting the Edit Change Order button under Tools.

Job - 1829 (Denise Gordon) Pending Change Order					
Job	Job	Customer	35075	Site	
Labor	Job Number 1829	Gordon, Denise	Denise Gordon		
Cost Details	Job Type ACC-Res	166 Gulf Rd	166 Gulf Rd		
Journals	Job Status Install Equipment	Plymouth, MI 48170	Plymouth, MI 48170		
Tools	System 35075 Access	(734) 992-1404	(734) 992-1404		
	Labor Units 0 (0 Used)				
Log					
	Date	CO	Event	Description	User
	12/2/2017 8:58:30 AM	Y	Edited Document	Edited	Administrator
	11/28/2017 11:49:04 AM	Y	Add Change Order Request	Added	Administrator
	11/28/2017 10:02:48 AM	N	Changed Job Locked Flag	Job is locked, before Task Signoffs	Administrator
	11/28/2017 10:02:48 AM	N	Approved Job Task	3 Phase 01	Administrator
	11/28/2017 10:02:48 AM	N	Changed Job Locked Flag	Job is locked, after Task Signoffs	Administrator
	11/28/2017 9:55:33 AM	N	Unapproved Job Task	3 Phase 01	Administrator
	11/28/2017 9:55:13 AM	N	Changed Job Locked Flag	Job is locked, before Task Signoffs	Administrator
	11/28/2017 9:55:13 AM	N	Approved Job Task	3 Phase 01	Administrator
	11/28/2017 9:55:13 AM	N	Changed Job Locked Flag	Job is locked, after Task Signoffs	Administrator
	11/28/2017 9:54:09 AM	N	Added Parts	HID1346	Administrator
	11/28/2017 9:54:09 AM	N	Added Parts	EVDW-4917	Administrator
	11/28/2017 9:54:09 AM	N	Added Parts	ATPJKS1AD	Administrator
	11/28/2017 9:54:09 AM	N	Added Parts	WLS-914-433	Administrator
	11/28/2017 9:54:09 AM	N	Added Parts	470PB	Administrator
	11/28/2017 9:54:09 AM	N	Added Parts	HONFG1625SN	Administrator
	11/28/2017 9:42:55 AM	N	Unapproved Job Task	3 Phase 01	Administrator
	11/28/2017 9:27:44 AM	N	Changed Job Locked Flag	Job is locked, before Task Signoffs	Administrator
	11/28/2017 9:27:44 AM	N	Approved Job Task	1 Phase 01	Administrator
	11/28/2017 9:27:44 AM	N	Approved Job Task	2 Phase 01	Administrator
	11/28/2017 9:27:44 AM	N	Added Job Task	Lock For CO	Administrator
	11/28/2017 9:27:44 AM	N	Changed Job Locked Flag	Job is locked, after Task Signoffs	Administrator
	11/28/2017 9:24:06 AM	N	Deleted Install Charge	Job Part RSC	Administrator
	11/28/2017 9:23:15 AM	N	Added Install Charge	Install Access RSC	Administrator
	11/28/2017 9:23:15 AM	N	Added Install Charge	Job Part RSC	Administrator
	11/28/2017 9:22:03 AM	N	Added New Job System	New Job System	Administrator
	11/28/2017 9:18:53 AM	N	New Job	Added Job RSC	Administrator

Deleting Change Order Requests

A change order request may be deleted should it have been created in error. To delete a Change Order Request, press the Delete key in the lower left-hand corner of the screen.

Change Order Job: 1829 Customer: 35075-Gordon, Denise Site: Gordon, Denise

Job 1829	Customer 35075	Site
Job Type	ACC-Res	Gordon, Denise
Job Status	Install Equipment	166 Gulf Rd
CO Status	In Process	Plymouth, MI 48170 (734) 992-1404

Job Information

Change Order Components

Job Number (1829)

Description Access - Residential

Sold Date 11/28/2017

Installer

Salesperson Matt.Miller

Projected Start

☐ Permits Required

Permit 1

Permit 2

Permit 3

Tax Group MI-Wayne County

Branch MI

Install Company MI

Project Manager N/A

PO Number

Projected End

Notes (164 ch

Add (1) HID1346 key fob per customer request and signed authorization.
\$65.00 sales price.

Installs Change: (\$435.00)

Recurring Change: \$25.00

Materials Change: \$0.00

Requested By Administrator

Requested On 11/28/2017 6:49 AM

Delete

Submit

Save

Close

Confirm Delete

Are you sure you want to delete this Change Order Request?

Yes No

Submitting the Change Order Request

After all changes have been made, the Change Order may be submitted for approval by press the Submit button.

Change Order Job: 1829 Customer: 35075-Gordon, Denise Site: Gordon, Denise

Job 1829		Customer 35075	Site
Job Type	ACC-Res	Gordon, Denise	Gordon, Denise
Job Status	Install Equipment	166 Gulf Rd	166 Gulf Rd
CO Status	In Process	Plymouth, MI 48170 (734) 992-1404	Plymouth, MI 48170 (734) 992-1404

Job Information		Change Order Components	
Job Number	(1829)	Tax Group	MI-Wayne County
Description	Access - Residential	Branch	MI
Sold Date	11/28/2017	Install Company	MI
		Project Manager	N/A
Installer		PO Number	
Salesperson	Matt.Miller		
Projected Start		Projected End	
<input type="checkbox"/> Permits Required		Notes (164 characters remaining)	
Permit 1		Add (1) HID1346 key fob per customer request and signed authorization. \$65.00 sales price.	
Permit 2			
Permit 3			

Installs Change: (\$435.00) Recurring Change: \$25.00 Materials Change: \$0.00

Requested By: Administrator
Requested On: 11/28/2017 6:49 AM

Delete Submit Save Close

Users may review open change orders requests by clicking on the Change Order Request button at the top of the screen. Open Change Order Request have been created but have not been approved or rejected. Open Change Order Requests that have been created but not yet sent for approval will be displayed as “In Progress.” Those that are waiting for approval will be marked with a Status of “Submitted For Approval.”

Last Revised: January 19, 2018
Page 93 of 130

Withdrawing a Change Order Request

When an approver finds that a mistake has been made on the Change Order Request, the user that created the Change Order Request has the ability to Withdraw it, so that corrections can be made and the change order request re-submitted. To withdraw a change order request from the Change Order Request queue, the originator of the request should double-click on the change order to open it.

The screenshot shows the 'Open Job List' window. At the top, there are filters for '<All Job Statuses>', '<All Job Types>', '<All Companies>', '<All Installers>', and '<All Project Mgrs>'. Below these are checkboxes for 'Show Approved' and 'Show Rejected'. A 'Select Job Number' field contains '1724'. The main table lists jobs with columns: Job #, Description, Customer #, Site Name, Status, Created By, Created Date, Submitted Date, Approval Date, Approved By, and Rejected. Job 1724 is highlighted in blue. At the bottom, there is a status bar showing '0 PO's Received Since 12/2/2017' and buttons for 'Open' and 'Cancel'.

Job #	Description	Customer #	Site Name	Status	Created By	Created Date	Submitted Date	Approval Date	Approved By	Reje
1057	Access - Large Commercial	14187	Sister Of Notre Dame	In Process	Administrator	10/30/2017				False
1147	Access - Residential	213	Mountain Retreat	In Process	Administrator	10/26/2017				False
1232	Fire - Large Commercial	47731	Ditcher Quick & Hyde	In Process	Administrator	11/14/2017				False
1662 - 1	Access - Large Commercial	396	Meeka's Puppy Palace	In Process	Administrator	9/27/2017				False
1708	Access - Large Commercial	47283	Twins-Tech.com	In Process	Administrator	10/25/2017				False
1724	Access - Residential	47949	Page Turner	Submitted for Approval	AnneT	10/28/2017	12/2/2017			False
1751	Fire - Large Commercial	2019	Aetha	In Process	Administrator	10/27/2017				False
1833	Fire - Large Commercial	47976	Fur Ball Society	In Process	Administrator	11/30/2017				False
246-B	Fire - Large Commercial	47934	Bright N Early, Ltd	Submitted for Approval	Administrator	10/15/2017	12/2/2017			False

Once the change order is opened, the user may press the Withdraw button.

Change Order Job: 1724 Customer: 47949-Paige Turner Site: Paige Turner

Job 1724		Customer 47949		Site
Job Type	ACC-Res	Paige Turner		Paige Turner
Job Status	Jobcost	8401 Chagrin Blvd		8401 Chagrin Blvd
CO Status	Submitted for Approval	Chagrin Falls, OH 44023		Chagrin Falls, OH 44023

Job Information | Change Order Components

Installs | Recurring | Materials

Additions | Reversals

☐ Show Phases Auto-size Columns ☐


Job	Item	Description	Quantity	Change	Unit Price	Tax Exem	Extended	Labor Unit	Change	Cost Typ
1724	Install Acces...	Install Access System	1	0.00	\$4,500.00	<input type="checkbox"/>	\$0.00	0.00	0.00	0


Installs Change: No Change Recurring Change: No Change Materials Change: \$546.98


Requested By: AnneT Submitted by AnneT on 12/2/2017 11:24:48 AM

Requested On: 10/28/2017 2:30 PM

Change Order Request is Read-Only

 Withdraw

 Save

 Close

Once all editing has been completed, the user may re-submit the request again.

Users that do not have approval permission may open a change order review to read its contents, but they may not make any modifications to it. To open a change order request, double-click on it.

The screenshot shows the 'Open Job List' window with a table of jobs. A dialog box titled 'Read Only Change Order Request' is displayed over the table, indicating that the user is not allowed to edit the change order.

Open Job List

Select Job Number: 1829 ☐ Show Approved ☐ Show Rejected Total Change Order Requests: 10

Job #	Description	Customer #	Site Name	Status	Created By	Created Date	Submitted Date	Approval Date	Approved By	Reje
1057	Access - Large Commercial	14187	Sister Of Notre Dame	In Process	Administrator	10/30/2017				False
1147	Access - Residential	213	Mountain Retreat	In Process	Administrator	10/26/2017				False
1232	Fire - Large Commercial	47731	Ditcher Quick & Hyde	In Process	Administrator	11/14/2017				False
1662 - 1	Access - Large Commercial	396	Meeka's Puppy Palace	In Process	Administrator	9/27/2017				False
1708	Access - Large Commercial	47853	Jamies Test copy	In Process	Administrator	10/25/2017				False
1724	Access - Residential	47949	Paige Turner	In Process	AnneT	10/28/2017				False
1751	Fire - Large Commercial	2019	Aetna	In Process	Administrator	10/27/2017				False
1829	Access - Residential	35075	Denise Gordon	Submitted for Approval	Administrator	11/28/2017	12/2/2017			False
1833	Fire - Large Commercial	47976	Fur Ball Society	In Process	Administrator	11/30/2017				False
246-B	Fire - Large Commercial	47934	Bright N Early, Ltd	In Process	Administrator	10/15/2017				False

Read Only Change Order Request

You are not allowed to edit this change order, created by Sedona Master.
You would need Change Order Approval access to do so.
Let me show you what they've done.

OK

0 PO's Received Since
12/2/2017

Open Cancel

The request will open in Read-Only mode:

Change Order Job: 1829 Customer: 35075-Gordon, Denise Site: Gordon, Denise

Job 1829	Customer 35075	Site
Job Type ACC-Res	Gordon, Denise	Gordon, Denise
Job Status Install Equipment	166 Gulf Rd	166 Gulf Rd
CO Status Submitted for Approval	Plymouth, MI 48170 (734) 992-1404	Plymouth, MI 48170 (734) 992-1404


Job Information | **Change Order Components**

Job Number (1829)	Tax Group MI-Wayne County
Description Access - Residential	Branch MI
Sold Date 11/28/2017	Install Company MI
	Project Manager N/A
Installer	PO Number
Salesperson Matt.Miller	
Projected Start	Projected End
<input type="checkbox"/> Permits Required	Notes (164 characters remaining)
Permit 1	Add (1) HID1346 key fob per customer request and signed authorization.
Permit 2	\$65.00 sales price.
Permit 3	



Installs Change: (\$435.00) Recurring Change: \$25.00 Materials Change: \$0.00

Requested By Administrator Submitted by Administrator on 12/2/2017 10:15:24 AM

Requested On 11/28/2017 6:49 AM

 Withdraw

Change Order Request is Read-Only

 Save  Close

A list of previously approved Change Orders may be added to the list by placing a checkmark in the Box "Show Approved."

Open Job List

<All Job Statuses> <All Job Types> <All Companies> <All Installers> <All Project Mgrs>

Select Job Number ☒ Show Approved (46) ☐ Show Rejected

Total Change Order Requests: 56

Job #	Description	Customer #	Site Name	Status	Created By	Created Date	Submitted Date	Approval Date	Approved By	R ▲
1057	Access - Large Commercial	14187	Sister Of Notre Dame	In Process	Administrator	10/30/2017				F.
1060 - 1	Access - Large Commercial-% Billing	371	Piggly Wiggly	Approved	Administrator	9/20/2017	9/20/2017	9/20/2017	Administrator	F.
1147	Access - Residential	213	Mountain Retreat	In Process	Administrator	10/26/2017				F.
120 - C - 1	Access - Large Commercial-% Billing	47933	Grinn & Barlett	Approved	Administrator	10/27/2017	10/27/2017	10/27/2017	Administrator	F.
1232	Fire - Large Commercial	47731	Ditcher Quick & Hyde	In Process	Administrator	11/14/2017				F.
1662 - 1	Access - Large Commercial	396	Meeka's Puppy Palace	In Process	Administrator	9/27/2017				F.
1666 - 1	Intrusion - Residential/Small Commer...	25583	Kathryn Jones	Approved	Administrator	10/28/2017	10/28/2017	10/28/2017	Administrator	F.
1686 - 1	Access - Large Commercial	2010	Eve Stewart	Approved	Administrator	10/27/2017				F.
1697 - 1	Access - Large Commercial	12341	International Bar Code	Approved	Administrator	9/28/2017	9/28/2017	9/28/2017	Administrator	F.
1697 - 2	Access - Large Commercial	12341	International Bar Code	Approved	Administrator	9/28/2017	9/28/2017	9/28/2017	Administrator	F.
1706 - 1	CCTV - Residential/Small Commercial	47932	Heidi Hoe	Approved	Administrator	10/27/2017	10/27/2017	10/27/2017	Administrator	F.
1708	Access - Large Commercial	47853	James Test copy	In Process	Administrator	10/25/2017				F.
1712 - 1	Parts & Smarts	47939	Sea Yasson	Approved	AnneT	10/15/2017	10/15/2017	10/15/2017	Administrator	F.
1712 - 2	Parts & Smarts	47939	Sea Yasson	Approved	Administrator	10/15/2017	10/15/2017	10/15/2017	Administrator	F.
1712 - 3	Parts & Smarts	47939	Sea Yasson	Approved	Administrator	10/26/2017				F.
1713 - 1	CCTV - Large Commercial	47940	Myles From Nowhere	Approved	Administrator	10/15/2017	10/15/2017	10/15/2017	Administrator	F.
1713 - 2	CCTV - Large Commercial	47940	Myles From Nowhere	Approved	Administrator	10/15/2017	10/15/2017	10/15/2017	Administrator	F.
1715 - 1	CCTV - Large Commercial	47942	Tequila Mockingbird	Approved	Administrator	10/15/2017	10/15/2017	10/15/2017	Administrator	F.
1715 - 2	CCTV - Large Commercial	47942	Tequila Mockingbird	Approved	Administrator	10/15/2017	10/15/2017	10/15/2017	Administrator	F.
1715 - 3	CCTV - Large Commercial	47942	Tequila Mockingbird	Approved	Administrator	10/15/2017	10/15/2017	10/15/2017	Administrator	F.
1724	Access - Residential	47949	Paige Turner	In Process	AnneT	10/28/2017				F.
1726 - 1	Fire - Large Commercial	47950	Ollie Baba	Approved	Administrator	10/22/2017	10/22/2017	10/22/2017	Administrator	F.
1726 - 2	Fire - Large Commercial	47950	Ollie Baba	Approved	Administrator	10/22/2017	10/22/2017	10/22/2017	Administrator	F.
1727 - 1	Fire - Large Commercial	47951	Bickers & Bickers Attornies At Law	Approved	Administrator	10/25/2017	10/25/2017	10/25/2017	Administrator	F.
1741 - 1	Add On/Upgrade - Large Commercial	2144204	Curl Up and Dye Hairdressers	Approved	Administrator	10/27/2017	10/27/2017	10/27/2017	Administrator	F.
1741 - 2	Add On/Upgrade - Large Commercial	2144204	Curl Up and Dye Hairdressers	Approved	Administrator	10/27/2017	10/27/2017	10/27/2017	Administrator	F.
1741 - 3	Add On/Upgrade - Large Commercial	2144204	Curl Up and Dye Hairdressers	Approved	Administrator	10/28/2017	10/28/2017	10/28/2017	Administrator	F.
1741 - 4	Add On/Upgrade - Large Commercial	2144204	Curl Up and Dye Hairdressers	Approved	Administrator	10/28/2017	10/28/2017	10/28/2017	Administrator	F.
1743 - 1	Parts & Smarts	47942	Tequila Mockingbird	Approved	Administrator	10/27/2017	10/27/2017	10/27/2017	Administrator	F.
1743 - 2	Parts & Smarts	47942	Tequila Mockingbird	Approved	Administrator	10/27/2017	10/27/2017	10/27/2017	Administrator	F.
1744 - 1	Add On/Upgrade - Residential/Small ...	47935	Lox Stock & Barrel	Approved	Administrator	10/27/2017	10/27/2017	10/27/2017	Administrator	F.
1744 - 2	Add On/Upgrade - Residential/Small ...	47935	Lox Stock & Barrel	Approved	Administrator	10/27/2017	10/27/2017	10/27/2017	Administrator	F.
1745 - 1	Parts & Smarts	17219	Hobby Tyne Distributors	Approved	Administrator	10/27/2017	10/27/2017	10/27/2017	Administrator	F.
1745 - 2	Parts & Smarts	17219	Hobby Tyne Distributors	Approved	Administrator	10/27/2017	10/27/2017	10/27/2017	Administrator	F.
1750 - 1	Parts & Smarts	47953	Cheese Louise	Approved	Administrator	10/27/2017	10/27/2017	10/27/2017	Administrator	F.
1751	Fire - Large Commercial	2019	Aetna	In Process	Administrator	10/27/2017				F.
1753 - 1	CCTV - Large Commercial	47954	Wags To Riches	Approved	Administrator	10/27/2017	10/27/2017	10/27/2017	Administrator	F.
1753 - 2	CCTV - Large Commercial	47954	Wags To Riches	Approved	Administrator	10/27/2017	10/27/2017	10/27/2017	Administrator	F.
1754 - 1	Access - Residential	47959	Cammie Sole	Approved	Administrator	10/28/2017	10/28/2017	10/28/2017	Administrator	F.
1754 - 2	Access - Residential	47959	Cammie Sole	Approved	Administrator	10/28/2017	10/28/2017	10/28/2017	Administrator	F.
1759 - 1	Access - Large Commercial	47961	Huff Puff & Blowe	Approved	Administrator	10/28/2017	10/28/2017	10/28/2017	Administrator	F.
1765 - 1	Access - Large Commercial	47861-1	James Test 1	Approved	Administrator	10/31/2017	10/31/2017	10/31/2017	Administrator	F.
1766 - 1	Add On/Upgrade - Residential/Small ...	47959	Cammie Sole	Approved	Administrator	10/31/2017	10/31/2017	10/31/2017	Administrator	F.
1766 - 2	Add On/Upgrade - Residential/Small ...	47959	Cammie Sole	Approved	Administrator	10/31/2017	10/31/2017	10/31/2017	Administrator	F.
1766 - 3	Add On/Upgrade - Residential/Small ...	47959	Cammie Sole	Approved	Administrator	11/9/2017	11/9/2017	11/9/2017	Administrator	F.
1785 - 1	Access - Residential	47968	Xavier Breath	Approved	Administrator	11/12/2017	11/12/2017	11/12/2017	Administrator	F.
1785 - 2	Access - Residential	47968	Xavier Breath	Approved	Administrator	11/12/2017	11/12/2017	11/12/2017	Administrator	F.

0 PO's Received Since
12/2/2017

Open Cancel

[illegible]

Approve or Reject A Change Order Request

Approvers may open a Change Order Request by highlighting and double clicking the Change Order Request from the Change Order List. Approvers may either approve or reject the change order. The content may not be changed by anyone other than the individual who created the change order. . If further editing is needed, the approver should close the Change Order Request and contact the individual that submitted it to have them Withdraw the Change Order Request from approval (see section on Withdrawing a Change Order Request above).

If the Change Order is ready for approval, the approver may click on the Approve button. If the Change Order needs to be removed, the approver will reject the change order request.

Change Order Job: 1829 Customer: 35075-Gordon, Denise Site: Gordon, Denise

Job 1829		Customer 35075	Site
Job Type	ACC-Res	Gordon, Denise	Gordon, Denise
Job Status	Install Equipment	166 Gulf Rd	166 Gulf Rd
CO Status	Submitted for Approval	Plymouth, MI 48170 (734) 992-1404	Plymouth, MI 48170 (734) 992-1404

Job Information

Change Order Components

Job Number (1829)

Description Access - Residential

Sold Date 11/28/2017

Installer

Salesperson Matt.Miller

Projected Start

☐ Permits Required

Permit 1

Permit 2

Permit 3

Tax Group MI-Wayne County

Branch MI

Install Company MI

Project Manager N/A

PO Number

Projected End

Notes (164 characters remaining)

Add (1) HID1346 key fob per customer request and signed authorization.
\$65.00 sales price.

Installs Change: (\$435.00)

Recurring Change: \$25.00

Materials Change: \$0.00

Requested By Administrator

Submitted by Administrator on 12/2/2017 10:15:24 AM

Requested On 11/28/2017 6:49 AM

Approve

Reject

Save

Close

Change Order Request is Read-Only

When a Change Order Request is approved that contains both positive additions and negative reversals, two separate change orders will automatically be created – one for the reversals and a separate one for the additions. The approver has the ability to change the change order numbers. Once the change orders have been created, the first one listed will be locked from further activity by anyone.

The following change order(s) will be added using the job number(s) shown below. You can change them now, if you'd like. (Note that, if both an additive change order and a reversal change order are being created, the reversal will be locked after approval.)

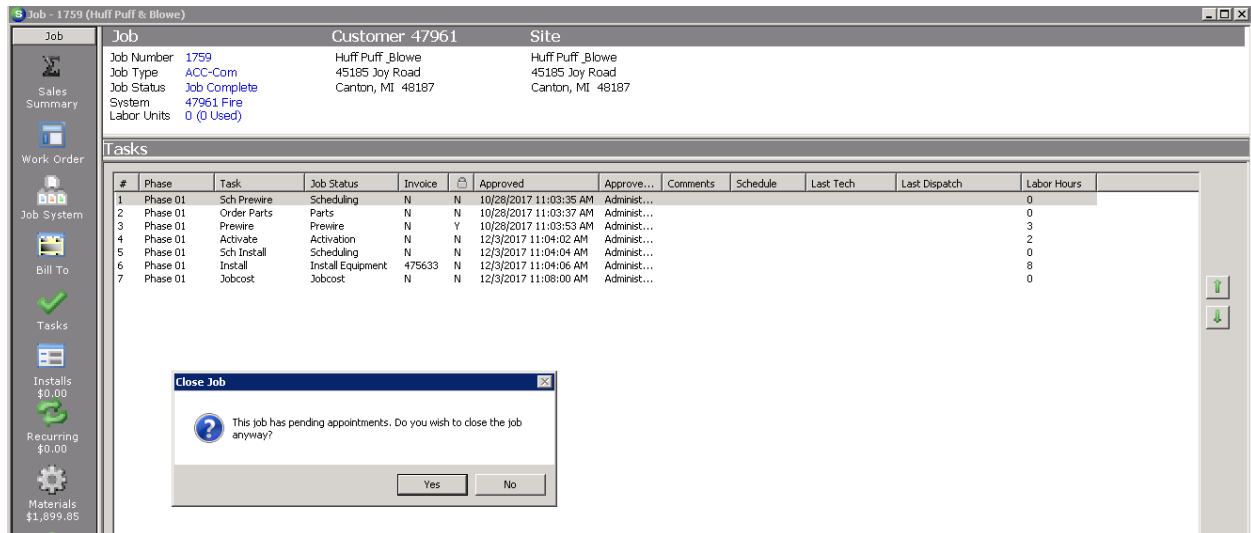
Reversal CO Job Number

Add CO Job Number

Once approved, the Change Order Request will come off of the open Change Order Request List.

Closing A Job with Open Appointments

A message will be displayed when a user attempts to close a job for which there are pending appointments that have not been dispatched, arrived, or departed.



Install Items

When a customer has a capital improvement project (or other situation for which an otherwise taxable customer cannot be charged tax), it is now possible to mark the install item as being tax exempt. Please see SedonaSetup – Tax Tables in the Enhancements section for details on how to set this up.

Job - 1837 (Advanced Property Management)

Job	Customer 2044	Site
Job Number 1837	Advanced Property Management	Advanced Property Management
Job Type ACC-Com	Advanced Property Management	19 Woodland Street
Job Status Parts	19 Woodland Street	Woodland Medical Center
System R10973 Fire	Detroit, MI 48201	Detroit, MI 48201
Labor Units 20 (0 Used)	(586) 644-1571	(586) 657-8981

Installs

Item	Description	Phase	QTY	Unit Price	Extended Price	Tax	Exempt	Units	Cost Type	Cost
Job Labor LCOM	Job Labor-Commercial	Phase 01	1	1000.00	1000.00	0.00	Y	20	O	0.00

Total Install Labor Units 20

Installation Totals 1000.00 0.00

Item: Job Labor LCOM Qty: 1

Description: Job Labor-Commercial Unit Price: 1000.00 ☒ Tax Exempt

Phase Code: Phase 01 Labor Units: 20

Cost Type: O

Cost: 0.00

Save New Delete

Apply Template Apply

Materials List

Local Zone

A new column "Local Zone" has been added to the materials list. When equipment is transferred from a job to the customer's equipment list at the close of a job, its zone location will be transferred with it.

Job - 1829 (Denise Gordon)

Job	Customer 35075	Site
Job Number 1829	Gordon, Denise	Denise Gordon
Job Type ACC-Res	166 Gulf Rd	166 Gulf Rd
Job Status Install Equipment	Plymouth, MI 48170	Plymouth, MI 48170
System 35075 Access	(734) 992-1404	(734) 992-1404
Labor Units 1 (0 Used)		

Materials

☑ Show Phases Warehouse Main-MI

Phase	Part	Description	Vendor	Qty	On Hand	Location	Local Zone	Unit	Ext Price	Tax	Exempt	LU	Issued	Stock	PO Cost	PO Description
Phase 0:	HID1346	ACCESS KEY FOB	Bosch	1	0	<none>		0.00	0.00	0.00	<input type="checkbox"/>	0	0	<input checked="" type="checkbox"/>	0.0000	
Phase 0:	EVDW-4917	EVDW-4917	ADI	1	0	<none>	1	0.00	0.00	0.00	<input type="checkbox"/>	0	0	<input checked="" type="checkbox"/>	0.0000	
Phase 0:	AIPJK51AD	ALPHONE VIDEO INTRO	Comm	1	0	<none>	2	0.00	0.00	0.00	<input type="checkbox"/>	0	0	<input checked="" type="checkbox"/>	0.0000	
Phase 0:	WLS-914-433	WIRELESS PIR MOTION	ATL	1	0	<none>	2	0.00	0.00	0.00	<input type="checkbox"/>	0	0	<input checked="" type="checkbox"/>	0.0000	
Phase 0:	470PB	LOW TEMP PROBE TO 5	Comm	1	0	<none>	3	0.00	0.00	0.00	<input type="checkbox"/>	0	0	<input checked="" type="checkbox"/>	0.0000	
Phase 0:	HONFG1625SN	V-PLEX GLASSBREAK DE	Comm	1	0	<none>	1	0.00	0.00	0.00	<input type="checkbox"/>	0	0	<input checked="" type="checkbox"/>	0.0000	
											<input type="checkbox"/>			<input type="checkbox"/>		

Installs \$5,000.00

Recurring \$0.00

Materials \$0.00

Job Costing

Commissions

Custom Fields

Tax Exempt Line

Parts Priced Jobs

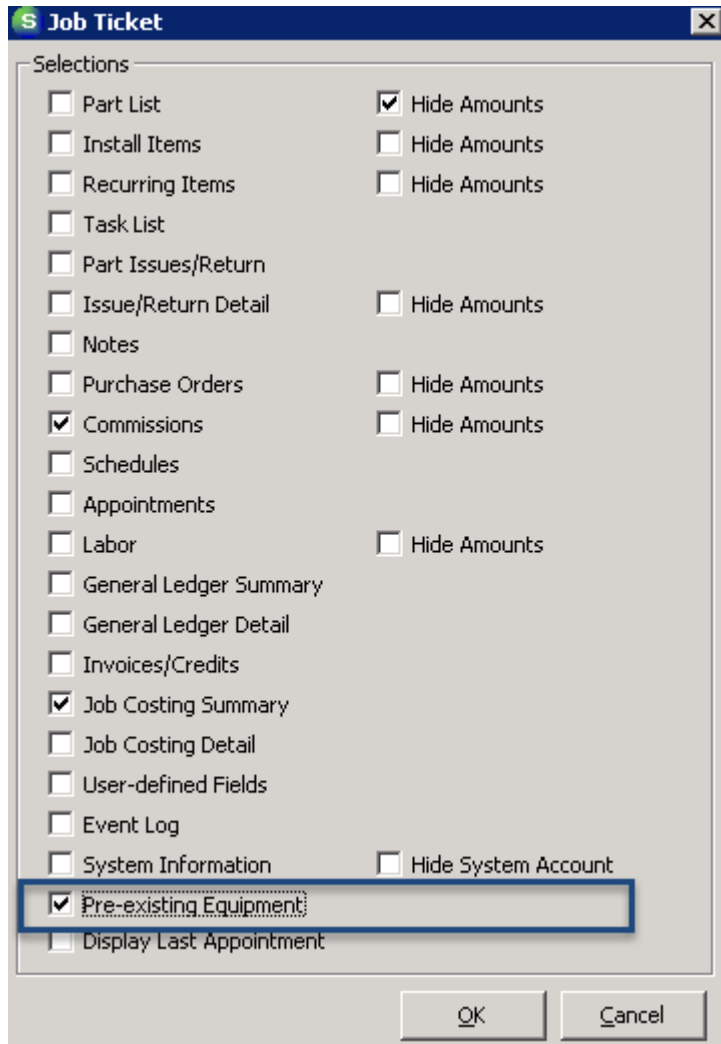
When a job type is setup to bill the customer for every part used on the job, it is now possible to mark individual parts as being tax exempt (e.g., for parts that are used in capital improvement projects or similar situations for which a specific customer is usually charged tax). Please see SedonaSetup – Tax Tables in the Enhancements section for details on how to set this up.

The screenshot displays the 'Job - 1138 (Jack Frost)' window. The top section shows job details: Job Number 1138, Job Type Template, Job Status Parts, System 47661 Access, and Labor Units 0 (0 Used). The Customer is 47661 and the Site is Jack Frost. The Materials section is active, showing a table with columns: Phase, Part, Description, Vendor, Qty, On Hand, Location, Local Zone, Unit Price, Ext Price, Tax, Exempt, LU, Issued, Stock, PO Cost, and PO Description. Two materials are listed: Phase 01 SPASSUMSKAF TEST & RESET S (Qty 1, On Hand 0, Unit Price 59.29, Ext Price 59.29, Tax 4.30) and Phase 01 RP-7 REMOTE PLATE (Qty 2, On Hand 0, Unit Price 40.70, Ext Price 81.40, Tax 5.90). The 'Exempt' checkbox for the second material is highlighted with a blue box.

Phase	Part	Description	Vendor	Qty	On Hand	Location	Local Zone	Unit Price	Ext Price	Tax	Exempt	LU	Issued	Stock	PO Cost	PO Description
Phase 01	SPASSUMSKAF	TEST & RESET S	ADI	1	0			59.29	59.29	4.30	<input checked="" type="checkbox"/>	0	0	<input type="checkbox"/>	21.5600	
Phase 01	RP-7	REMOTE PLATE	Tri-Ed	2	0			40.70	81.40	5.90	<input checked="" type="checkbox"/>	0	2	<input type="checkbox"/>	0.0000	

Job Tickets

When a job is attached to an existing system, and the customer has equipment already listed in their Customer Equipment List, the job ticket print options box will present an option to print pre-existing equipment on the job ticket.



The screenshot shows a dialog box titled "Job Ticket" with a "Selections" section. It contains a list of checkboxes for various items to be included in the job ticket. The "Pre-existing Equipment" checkbox is checked and highlighted with a blue border. The "OK" and "Cancel" buttons are at the bottom right.

Selection	Hide Amounts
<input type="checkbox"/> Part List	<input checked="" type="checkbox"/> Hide Amounts
<input type="checkbox"/> Install Items	<input type="checkbox"/> Hide Amounts
<input type="checkbox"/> Recurring Items	<input type="checkbox"/> Hide Amounts
<input type="checkbox"/> Task List	
<input type="checkbox"/> Part Issues/Return	
<input type="checkbox"/> Issue/Return Detail	<input type="checkbox"/> Hide Amounts
<input type="checkbox"/> Notes	
<input type="checkbox"/> Purchase Orders	<input type="checkbox"/> Hide Amounts
<input checked="" type="checkbox"/> Commissions	<input type="checkbox"/> Hide Amounts
<input type="checkbox"/> Schedules	
<input type="checkbox"/> Appointments	
<input type="checkbox"/> Labor	<input type="checkbox"/> Hide Amounts
<input type="checkbox"/> General Ledger Summary	
<input type="checkbox"/> General Ledger Detail	
<input type="checkbox"/> Invoices/Credits	
<input checked="" type="checkbox"/> Job Costing Summary	
<input type="checkbox"/> Job Costing Detail	
<input type="checkbox"/> User-defined Fields	
<input type="checkbox"/> Event Log	
<input type="checkbox"/> System Information	<input type="checkbox"/> Hide System Account
<input checked="" type="checkbox"/> Pre-existing Equipment	
<input type="checkbox"/> Display Last Appointment	

Recurring

When a customer has a capital improvement project (or other scenario in which an otherwise taxable customer cannot be charged tax), it is now possible to indicate recurring items for which tax cannot be charged on the job invoice. Placing a checkbox in the Exempt column prevents tax from being charged on that line item. For information on how to setup tax exempt line items, please see SedonaSetup – Tax Table in the Enhancements section of these release notes.

Job - 1837 (Advanced Property Management)

Job Number: 1837
Job Type: ACC-Com
Job Status: Parts
System: R10973 Fire
Labor Units: 20 (0 Used)

Customer 2044
Advanced Property Management
19 Woodland Street
Detroit, MI 48201
(586) 644-1571

Site
Advanced Property Management
19 Woodland Street
Woodland Medical Center
Detroit, MI 48201
(586) 657-8981

Recurring

Item Code	Description	Sub Item Of	Bill Cycle	Cycle Start	RMR Amount	Cycle Amt	Tax	Exempt	Master	Active
MON-Taxable	Monitoring		Annual	12:00:00 AM	120.00	1440.00	0.00	Y	N	

Total Monthly Amount: 120.00 0.00

Recurring Item: MON-Taxable
Description: Monitoring
Sub Item Of:
Bill Cycle: Annual
Cycle Start:
RMR Amount: 120.00
Cycle Amount: 1440.00
Tax Exempt: ☒
Enter as Monthly Amt Only: ☒
Buttons: Save, New, Delete, Apply Template, Apply

Point of Sale

Inventory

The POS System will now utilize the rules setup in the Inventory Setup table for the handling of parts for which a sufficient quantity is not in stock.

Sedona Office Setup (SedonaSecurity)

File Find Find Next View Tools Help

Sedona Setup

Description	Area
Sales Department Maintenance	SM
Routes	SV
RMR Reasons	CM
RMR Escalations	CM
Resolution Codes	SV
Quote Types	SM
Product Line	IN
Problem Codes	SV
Printer Setup	OP
Prevailing Wages	JM
Payroll Setup	PR
Payment Methods	CM
Part Labor Unit Desc	IN
Panel Types	SV
Open Current Accounting Period	GL
Note Type	OP
Material Handlers	IN
Manufacturer	IN
Lead Sources	SM
Late Fee Rules	AR
Labor Tasks	JM
Job Types	JM
Job Tasks	JM
Job Statuses	JM
Job Phases	JM
Job Expense Types	JM
Job Approval Group	JM
Item Types	AR
Invoice Items	AR
Invoice Descriptions	AR
Inventory Setup	IN
Integration Setup	OP
Instruction Notes	SV
Installers	JM
Install Companies	JM
Inspection Items	SV

Inventory Setup

Warehouse: Main-MI

Transfer Account: 258300

Physical Adjustment Account: 580112

*Inventory Transfer**

COS - Inventory Variances

Negative Quantities: ☐ Do Not Allow ☒ Warning Message ☐ Allow

Add Parts to All Warehouses: ☐

Inventory Processing

Asset Account: 120000

*Inventory**

Default COGS: 520001

COS - Service-Parts

Invoice Item: SVC Part-TX

Purchase Price Variance Account: 510010

Use Material Handler for Warehouse Security: ☒

Print Zero Quantity On Hand on Physical Count Sheets: ☒

Costing

Default Method: Standard

Use Standard Cost on Direct Expense Parts: ☐

Apply

Based on the settings, users will be either be presented with a message that an item is out of stock and the transaction cannot be completed (Do Not Allow), a warning message that there not sufficient stock on hand and asking if the transaction should proceed (Warning Message) or presenting a message indicating that sufficient stock is not on hand and allowing the transaction to proceed (Allow). Warning messages and the Allow option will enable parts to go negative in inventory when a sufficient quantity is not on-hand.

Invoice

Tax Exempt Line Item

When a customer has a capital improvement project (or other scenario in which an otherwise taxable customer cannot be charged tax), it is now possible to indicate specific line items for which tax cannot be charged when creating an invoice. Placing a checkbox in the Exempt column prevents tax from being charged on that line item. For information on how to setup tax exempt line items, please see SedonaSetup – Tax Table in the Enhancements section of these release notes.

The screenshot displays the 'Invoice' window in SedonaOffice. At the top, there are fields for Customer ID (7900), Category (Jobs Com), A/R Account (110120), and Tax Group (MI). The invoice number is 475636. The customer address is City Of Plymouth, 10 Prospect Street, Plymouth, MI 48170. The invoice date is 12/3/2017, and the aging date is also 12/3/2017. The warehouse is Main-MI, and the invoice type is Miscellaneous. The salesperson is Matt Miller. The posting date is 12/3/2017. The items total is \$0.00, and the parts total is \$1,376.92. The 'Part List' table shows three items: 302AW135 (ALL WEATHER HEAT DETECTOR 135 DEGREES), 449CSRT (4-WIRE P/E SMOKE DETECTOR W/SOUNDER), and 5056 (MS-5024UD PANEL FIRE). The 'Exempt' column has checkboxes for each item, with the first two checked. The 'Amount' column shows the total for each item: 58.77, 125.24, and 1,008.90. The 'Sub Total' is 1,376.92, 'Tax' is 0.00, 'Total' is 1,376.92, and 'Balance Due' is 1,376.92. The 'Description' field is empty, and the 'Contact' field is also empty. The 'Memo' field is empty. The 'Complete' checkbox is checked, and the 'Add to Print Queue' checkbox is also checked. The 'Save' and 'Close' buttons are at the bottom right.

Part	Description	Exempt	Qty	Unit Rate	Amount
302AW135	ALL WEATHER HEAT DETECTOR 135 DEGREES	<input checked="" type="checkbox"/>	2	58.77	
449CSRT	4-WIRE P/E SMOKE DETECTOR W/SOUNDER	<input checked="" type="checkbox"/>	2	125.24	
5056	MS-5024UD PANEL FIRE	<input checked="" type="checkbox"/>	1	1008.9	1,008.90

Summary	
Sub Total	1,376.92
Tax	0.00
Total	1,376.92
Balance Due	1,376.92

SedonaDocs

Number of Documents

Users may now store up to 5000 documents on a single customer.

SedonaSchedule

Service Tickets

Go Back Status

It is now possible to remove the checkmark from the “Needs Go Back” field on a service ticket appointment that occurred in a closed accounting period without the need to re-open the accounting period.

The screenshot displays the 'Ticket Dispatch' window in SedonaOffice. The window is divided into several sections:

- Appointment Detail:** Shows ticket information for Ticket 5201 at Bickers & Bickers Attorneys At Law. The problem is 'Low Battery' and the technician is 'Mike Walker'. A warning message states: 'There are 2 open tickets for this site.'
- Labor:** A table showing labor rates for Regular (0.75 hours, 120.00 rate), Overtime (0.0 hours, 180.00 rate), and Holiday (0.0 hours, 240.00 rate).
- Dispatch Times:** A section with dropdowns for Scheduled, Dispatched, Arrived, and Departed times, all set for 11/01/2017.
- Appointment Resolution:** A section with a 'Resolution' dropdown set to '1 Add' and a 'Notes' field containing 'Replaced battery and tested. All OK.' Below this are two checkboxes: 'Resolves Ticket' (checked) and 'Needs Go Back' (unchecked).
- Payment Arrangements:** A section on the right with a 'Service Fee' checkbox checked and an 'Amount' of 115.00.

The 'Needs Go Back' checkbox is highlighted with a red box, indicating the feature being discussed in the release notes.

Purchase Orders

Drop Ship

Users now have the option to drop ship parts on a purchase order that is tied to a service ticket.

New Purchase Order

Vendor: ADI Category: SVC T&M

☐ Print Now ☐ Direct Expense
☐ Acknowledged

Purchase Order

Vendor Address: ADI
231 West 42nd St
New York, NY 10024
(800) 555-4321

PO #: 4094 Branch: OH

Tracking #: Ordered: 12/05/2017

Ship: Warehouse: Main-OH

Parts Due: Ticket: 5201

Created By: Ship Method:

Last Updated:

Ship To

SedonaSecurity
547 Washington
Chagrin Falls, OH 44022

Parts \$300.00 Kit Parts Expenses Documents

No Special Order Parts Allowed

Part	Description	Vendor Part	Vendor Desc	Pkg Quantity	Unit Of Measure
0300-004	AXIS SMALL IN _	384637	AXIS SMALL IN _	1	EA

Ship To

Would you like to drop ship?

Yes No

Get Kit Parts Price Check New

Memo: This memo must appear on all ADI POs as it contains important information regarding our arrangements with ADI.

Total: \$300.00
Received:

Resolution Notes

A new notes length box is displayed in the bottom left-hand corner of the service ticket enabling the user to see how many of the 1024 characters they have typed so that they do not exceed the character limit that will fit into the invoice memo box for a resolution note.

Ticket #5201

Service Ticket Custom Fields Appointments and Labor Billing Documents (0) Equipment and Parts Journal Notes (1) Other Items Purchase Orders (0)

Service History Ticket Log Ticket Group Payment Arrangements

Customer: 47951 Bickers & Bickers Attorneys At Law
Site: Bickers & Bickers Attorneys At Law
8401 Chagrin Blvd
Chagrin Falls, OH 44023

Created: 12/3/2017 5:05 PM
Created By: Administrator
Status: Departed

Contact: Mark Bickers
Phone: (440) 247-8943
Notify: mark@bandblaw.com

Notes	Level	Resolution	Entered	By	Edited	Edited By
Panel will not stop beeping after power failure	2 - Customer Restrict...	<input type="checkbox"/>	12/3/2017 5:05 PM	Administrator	12/3/2017 5:05 PM	Administrator

A new notes length box is displayed in the bottom left-hand corner of the service ticket enabling the user to see how many characters they have typed so that they do not exceed the character limit that will fit into the invoice memo box for a resolution note.

Access Level: 1 - No Restriction
Notes Length: 259

Buttons: List, Instructions, New, Save

Ticket Queue Field Chooser

System Type has been added to the service ticket queue field chooser.

The screenshot displays the SedonaOffice Ticket Queue interface. On the left, there is a calendar for December 2017 and January 2018. Below the calendar is a sidebar with a list of fields: Site, System, Contact, Problem, and Technician. A 'Field Chooser' dropdown menu is open, showing a list of fields with checkboxes. The 'System Type' field is selected. The main area shows a table of tickets with columns: Ticket, Account, System Type, Created On, Technician, and Customer Name. The table contains several rows of ticket data.

Ticket	Account	System Type	Created On	Technician	Customer Name
2859	CCTV	CCTV	01/14/2014	Marshall Watson	Elite Karate
2895	25-64793	Intrusion	01/23/2014	Madison Morrison	Dispatch, From
246	4-SITE2	CCTV	01/31/2014	Orlando Smith	Raymour & Flanigan
13251	Access	Access	02/07/2014	Mack Knife	Ashley, Victoria
535	Intrusion	Intrusion	02/10/2014	Mike Walker	David's Mother-in-law
003	Fire	Fire	02/14/2014	Marshall Watson	Detroit Unified School...
589	Intrusion	Intrusion	02/18/2014	Mike McKenzie	Anne Terwilliger
589	Intrusion	Intrusion	02/18/2014	Marshall Watson	Smith, Libby
3616	Intrusion	Intrusion	02/18/2014	Marshall Watson	Smith Hill Day Center
50-0	Intrusion	Intrusion	02/19/2014		Johnson, Michael
56	Intrusion	Intrusion	02/21/2014	Mark Taylor	Jane Smith
524	Intrusion	Intrusion	02/25/2014	Marlin Larson	Wright, Kurt
346	CCTV	CCTV	02/26/2014		Gill-Montague Reg Hig...
71	Intrusion	Intrusion	02/27/2014	Mark Taylor	Permanent Realty
343	Intrusion	Intrusion	02/27/2014	Mark Taylor	McLaughlin, Annette

SedonaSetup

Tax Tables

Tax Exempt Line Items

When a customer has a capital improvement project (or other scenario in which an otherwise taxable customer cannot be charged tax), it is now possible to indicate specific line items for which tax cannot be charged within the specific tax tables that are affected by the capital improvement project. Modifications will need to be made to tax tables that makeup the customer's designated tax group. Modifications will also need to be made to the user's permissions in Usergroups

The SedonaOffice Administrator should review the tax tables that make up the customer's tax group. This information may be found by navigating to the Tax Group table and selecting the customer's tax group.

Sedona Office Setup (SedonaSecurity)

File Find Find Next View Tools Help

Sedona Setup

Description	Area
Warranty Types	SV
Warehouses	IN
Vendors	AP
Vendor Types	AP
Users	OP
User Groups	OP
User Defined Table4	SM
User Defined Table3	SM
User Defined Table2	SM
User Defined Table1	SM
User Defined Setup	SM
UL Grade	CS
Type Of Customer	CM
Transmission Format	CS
Terms	AP
Terms	AR
Technicians	SV
Tax Tables	AR
Tax Groups	AR
Tax Agency	AP
System Types	CM
Status	SM
Statement Rules	AR
Signal Types	CS
Shipping Methods	AP
Setup Processing	AP
Setup Processing	AR
Setup Processing	JM
Setup Defaults	SV
Service Ticket Message	SV
Service Levels	SV
Service Companies	SV
Sedona Modules	OP
Scheduling and Appointments	SV
Sales Resolution Codes	SM
Sales Managers	SM

Tax Groups

☐ Tax Groups List

Tax Group	Description	Group Rate	Inactive
GST-AU	GST	N	N
Jamaica	Jamaica	N	N
MI	MI	N	N
MI-Exempt	MI-Exempt	N	N
MI-Oakland County	MI-Oakland County	N	N
MI-Tax Exempt	MI-Tax Exempt	N	N
MI-Wayne County	Michigan - Wayne County	N	N

☐ Include Inactive

Taxes | US Geo Linking | **Group Rate Setup** | Product Lines

☐ Inactive

Taxing Group: MI-Wayne County

Description: Michigan - Wayne County

Tax Code	Description	Rate
<input checked="" type="checkbox"/> Canton City Tax	Canton City Tax	1
<input checked="" type="checkbox"/> MI-State Sales Tax	MI-State Sales Tax	6.25
<input checked="" type="checkbox"/> MI-Wayne County	MI-Wayne County	0
<input type="checkbox"/> .87542	.87542	8.7542
<input type="checkbox"/> 1st 5000	1st 5000	7
<input type="checkbox"/> AL State	AL State	5
<input type="checkbox"/> AL-Phenix City Local	AL-Phenix City Local	8.75
<input type="checkbox"/> AT Zero in tax & non-tax	AT Zero in tax & non-tax	0
<input type="checkbox"/> GST	GST	8

Apply New Delete

Any user that will be selecting specific line items for tax exemption must have the Edit Item Tax Exemption permission in the SS section of the Usergroup table.

Sedona Office Setup (SedonaSecurity)

File Find Find Next View Tools Help

Sedona Setup

Description	Area
Sales Departments	SM
Sales Items	SM
Sales Managers	SM
Sales Resolution Codes	SM
Scheduling and Appointments	SV
Sedona Modules	OP
Service Companies	SV
Service Levels	SV
Service Ticket Message	SV
Setup Defaults	SV
Setup Processing	AP
Setup Processing	AR
Setup Processing	JM
Shipping Methods	AP
Signal Types	CS
Statement Rules	AR
Status	SM
System Types	CM
Tax Agency	AP
Tax Groups	AR
Tax Tables	AR
Technicians	SV
Terms	AP
Terms	AR
Transmission Format	CS
Type Of Customer	CM
UL Grade	CS
User Defined Setup	SM
User Defined Table1	SM
User Defined Table2	SM
User Defined Table3	SM
User Defined Table4	SM
User Groups	OP
Users	OP
Vendor Types	AP
Vendors	AP

User Groups

☐ User Groups

Group	Description	Level	Credit Limit
Accounting Clerk	Accounting Clerk	2	\$5,000.00
Admin	Admin	3	\$100,000.00
Admin Assistant	Admin Assistant	1	\$100.00
Administrator	Administrator	3	\$10,000.00
AP Query Only	AP Query Only	1	\$0.00
AR-Deb & Ruth	AR-Deb & Ruth	2	\$500.00
Data Entry Job	Data Entry Job	1	\$1.00
Dealers	Dealers	2	\$0.00
Dealers View	Dealers View with Notes	1	\$0.00

☐ Include Inactive

☒ User Group Edit ☐ Inactive

Code: Admin Assistant Description: Admin Assistant Level: 1 Credit Memo Limit: \$100.00

Application Access | Report Access

Access	Module
<input type="checkbox"/> Chain Accounts	SS
<input type="checkbox"/> Collection Status	SS
<input type="checkbox"/> Credit Reason	SS
<input type="checkbox"/> Customer Groups	SS
<input type="checkbox"/> Invoice Descriptions	SS
<input type="checkbox"/> Invoice Items	SS
<input type="checkbox"/> Payment Methods	SS
<input type="checkbox"/> RMR Reason	SS
<input type="checkbox"/> System Type	SS
<input type="checkbox"/> Taxing Group	SS
<input type="checkbox"/> Tax Table	SS
<input checked="" type="checkbox"/> Edit Item Tax Exemption	SS
<input type="checkbox"/> Currency	SS

Print Apply New Delete

Once all tax tables have been identified, navigate to the Tax Tables setup tables, highlight the first tax group for which line item exemptions will be needed and place a checkmark in the box entitled "Allow Line Item Exemption." Press Save. This process should be repeated for all other tax tables making up the customer's tax group that should not have sales tax charged for the project.

Sedona Office Setup (SedonaSecurity)

File Find Find Next View Tools Help

Sedona Setup

Description	Area
Warranty Types	SV
Warehouses	IN
Vendors	AP
Vendor Types	AP
Users	OP
User Groups	OP
User Defined Table4	SM
User Defined Table3	SM
User Defined Table2	SM
User Defined Table1	SM
User Defined Setup	SM
UL Grade	CS
Type Of Customer	CM
Transmission Format	CS
Terms	AP
Terms	AR
Technicians	SV
Tax Tables	AR
Tax Groups	AR
Tax Agency	AP
System Types	CM
Status	SM
Statement Rules	AR
Signal Types	CS
Shipping Methods	AP
Setup Processing	AP
Setup Processing	AR
Setup Processing	JM
Setup Defaults	SV
Service Ticket Message	SV
Service Levels	SV
Service Companies	SV
Sedona Modules	OP
Scheduling and Appointments	SV
Sales Resolution Codes	SM
Sales Managers	SM

Tax Table Setup

☐ Tax Tables

Tax	Description	Current Rate	Agency	GST
.87542	.87542	8.7542	MI Treasurer	N
1st 5000	1st 5000	7.0000	MI Treasurer	N
AL State	AL State	5.0000	OH Comptroller	N
AL-Phenix City Local	AL-Phenix City Local	8.7500	OH Comptroller	N
AT Zero in tax & non-tax	AT Zero in tax & non-tax	0.0000	MI Treasurer	N
Canton City Tax	Canton City Tax	1.0000	MI Treasurer	N
GST	GST	8.0000	MI Treasurer	Y
GST-AU	GST	10.0000	AU GST	N
HST	HST	5.0000	MI Treasurer	N
Jamaica	Jamaica	16.5000	AU GST	N
MelTax	MelTax	13.0000	Federal Taxes	N
MI 6%	MI 6%	6.0000	MI Treasurer	N
MI-Oakland County	MI-Oakland County	1.5000	MI Treasurer	N

☐ Include Inactive

Tax Table Setup | Effective Dates & Formula

☐ GST Tax

Tax Table:

Description:

Account: Local Tax Payable

Tax Agency:

☒ Allow Line Item Exemption

☐ Inactive

Item Types

- ☒ Central Station Monitoring
- ☒ Inventory Part-Jobs
- ☒ Inventory Part-Service
- ☒ IPS-PST
- ☒ Labor-Jobs
- ☒ Labor-Service
- ☒ LBS-PST
- ☒ Materials-Service
- ☒ North Carolina Taxable
- ☐ new one
- ☐ Non-Taxable Part

Apply New Delete

Usergroups

Accounts Receivable

Auto Process Non-Recurring Invoices

User that will be processing auto non-recurring invoices will need permission to the Auto Process Non-Recurring Invoices table within SedonaSetup. Placing a checkmark in this box enables the module to become visible under Accounts Receivable in the Application Tree.

Sedona Office Setup (SedonaSecurity)

File Find Find Next View Tools Help

Sedona Setup

Description	Area
Sales Departments	SM
Sales Items	SM
Sales Managers	SM
Sales Resolution Codes	SM
Scheduling and Appointments	SV
Sedona Modules	OP
Service Companies	SV
Service Levels	SV
Service Ticket Message	SV
Setup Defaults	SV
Setup Processing	AP
Setup Processing	AR
Setup Processing	JM
Shipping Methods	AP
Signal Types	CS
Statement Rules	AR
Status	SM
System Types	CM
Tax Agency	AP
Tax Groups	AR
Tax Tables	AR
Technicians	SV
Terms	AP
Terms	AR
Transmission Format	CS
Type Of Customer	CM
UL Grade	CS
User Defined Setup	SM
User Defined Table1	SM
User Defined Table2	SM
User Defined Table3	SM
User Defined Table4	SM
User Groups	OP
Users	OP
Vendor Types	AP
Vendors	AP

User Groups

☐ User Groups

Group	Description	Level	Credit Limit
Accounting Clerk	Accounting Clerk	2	\$5,000.00
Admin	Admin	3	\$100,000.00
Admin Assistant	Admin Assistant	1	\$100.00
Administrator	Administrator	3	\$10,000.00
AP Query Only	AP Query Only	1	\$0.00
AR-Deb & Ruth	AR-Deb & Ruth	2	\$500.00
Data Entry Job	Data Entry Job	1	\$1.00
Dealers	Dealers	2	\$0.00
Dealers View	Dealers View with Notes	1	\$0.00

☐ Include Inactive

☒ User Group Edit ☐ Inactive

Code: Admin Assistant Description: Admin Assistant Level: 1 Credit Memo Limit: \$100.00

Application Access | Report Access

Access	Module
<input checked="" type="checkbox"/> Client Management Reports	CM
<input checked="" type="checkbox"/> Central Station Tracking Data	CM
<input checked="" type="checkbox"/> Access to Complete Cancellations	CM
<input checked="" type="checkbox"/> Access to Add/Edit Inspections	CM
<input type="checkbox"/> Access to RMR Escalations	CM
<input type="checkbox"/> Access to Terminate Inspections	CM
<input checked="" type="checkbox"/> Accounts Receivable	AR
<input checked="" type="checkbox"/> Auto Process Non-Recurring Invoices	AR
<input type="checkbox"/> Batch Email Invoices	AR
<input type="checkbox"/> Credit Memo	AR
<input checked="" type="checkbox"/> Credit Off Invoices	AR
<input type="checkbox"/> Credit Request	AR
<input checked="" type="checkbox"/> Cycle Invoicing	AR

Print Apply New Delete

Application Corrections

Accounts Payable

ADI Integration

Reported Issue: When a purchase order that contained a part kit was printed, both the parts kit and the components of the kit were printed. This issue has been corrected.

Reported Issue: Pressing the “Get Part Kits” button multiple times caused the quantities in the in the part kits tab to increase. This issue has been corrected.

AP Query Builder

Reported Issue: Using the field “Credit_Job_Number” as a field to displayed caused the error message “-2147214900 The multi-part identifier “apcode.job_id” could not be bound” to be displayed. This issue has been corrected.

Bills

Reported Issue: When a user typed in a general ledger number onto the expense line, the job expense type associated with that general ledger number did not auto-populate. This issue has been corrected.

Reported Issue: The user created a bill that was not associated with a job. During a subsequent edit, the user added a job number onto an expense line and modified the job expense type to something other than “O.” Upon saving, the job expense type reverted back to its original designation. This issue has been corrected.

Reported Issue: Entering a decimal quantity on an expense line caused the quantity to round to the next full number. This issue has been corrected.

Reported Issue: When an entry was made onto the expense line, and the general ledger number was selected from the Chart of Accounts, the GST amount was not being added automatically. The GST was not properly calculated if the general ledger number was typed or selected from the recently used general ledger numbers in the drop-down list. This issue has been corrected.

Reported Issue: GST was rounding incorrectly on the half cent. This issue has been corrected.

Checks

Reported Issue: An error was received when voiding a check containing GST where the branch for the expenses was different from that of the branch on the check. This issue has been corrected.

Reported Issue: When a Write Check (no bill) is voided in one branch for an expense on another branch, the check must be voided on the branch from which the check was written and the expense reversed on the branch noted for the expense. When the void took place, the branch on which the expense was reversed was the incorrect branch. This issue has been corrected.

Purchase Orders

Reported Issue: The user selection for warehouses was not being saved in the Purchase Order list. This issue has been corrected.

Reported Issue: Entering a decimal quantity on an expense line caused the quantity to round to the next full number. This issue has been corrected.

Reported Issue: When a user attempted to re-open a purchase order that was attached to a closed job, the word “too” was displayed instead of the word “to” in the error message. This issue has been corrected.

Reported Issue: Users that assigned their own PO numbers were able to tab into the warehouse field and enter characters that did not match any warehouse contained in the drop-down list. When this happened a run-time error was received. This issue has been corrected.

Purchase Order Receipts

Reported Issue: Users that created expense only POs within a job were able to receive in the PO multiple times within the job. The receipt, however, did not appear on the vendor. This issue has been corrected.

Reported Issue: When an expense only PO was tied to a closed service ticket, the PO receipt was created with the total of the expense at the bottom, but the expense line representing the total was not displayed. This issue has been corrected.

Reported Issue: Users created a purchase order that was assigned to one job in the job costing box at the top of the PO. Expense lines on the PO were then created for costing to different jobs. Some of the expenses were charged to closed jobs where the job type did not permit costing to closed jobs. When the PO receipt was created and viewed from the vendor, the total of the expense was displayed at the bottom of the PO, but no expense line information was displayed on the receipt, and none of the jobs recorded the receipt of the expense. This issue has been corrected.

Vendor Return

Reported Issue: Users attempting to place a checkmark in the box “Close No Credit Expected” on a vendor return received an error message indicating that the quantity of the part exceeded that in the warehouse. This issue has been corrected.

Accounts Receivable

Credit Requests

Reported Issue: When crediting recurring invoices for either a sales tax correction, the dates of the RMR displayed in the site field instead of the line items being credited. This issue has been corrected.

Cycle Invoicing

Credits

Reported Issue: Users trying to apply unapplied credits at the end of cycle posting received errors that prevented the credits from being applied. This issue has been corrected.

Deferred Income

Reported Issue: When monthly retroactive billing took place for a customer, and the user selected the last calendar day of the month as the invoice date, the deferred income record was created for the month on the user’s workstation instead of the month being cycled. This issue has been corrected.

Invoice Forms

Reported Issue: The Bridgestone Standard Invoice Form did not include all information in the messages section. This issue has been corrected on this form as well as the following:

Custom Form (CS23)

Custom Form (CS42)

Custom Form (CS24)

Custom Form (CM42)

Custom Form (CS25)

Custom Form (CS44)

Custom Form (CS36)

Custom Form (CS49)

SedonaEmail

Reported Issue: Users of SedonaEmail reported that in version 5.7.90 the email button was missing when they wanted to email invoices. This issue was corrected in version 5.7.91.

Client Management

Bill To

Reported Issue: The Bill To Summary displayed site addresses instead of Bill To addresses on the customer record. This issue has been corrected.

Reported Issue: The postal code for addresses in the United Kingdom did not display on the screen. This issue has been corrected.

Customer Query Builder

Reported Issue: When the field RMR_Active was selected as the first field criteria, the user received the error message “-2147217913 – The conversion of a varchar data type to a datetime data type resulted in an out-of-range value.” This issue has been corrected.

Customer Search

Reported Issue: Customer Search returned master accounts that were outside of the user’s customer group designation(s). This issue has been corrected.

EFT

Reported Issue: A customer has one bank account setup as primary for recurring, and a credit card is then added and marked as primary for recurring. There is only one Bill To address on the customer. When the credit card was added, both addresses were marked as primary for recurring. This issue has been corrected.

Reported Issue: Users in 5.7.89 that right-clicked on Payment Options-Enter New EFT Transaction received the error that the maximum amount had been exceeded for the customer when trying to add an invoice to a batch. This issued is corrected in 5.7.90.

Inspections

Reported Issue: The inspection record equipment tab displayed multiple lines for each part. This issue has been corrected.

Sites

Reported Issue: Open two sites at once (Site A and Site B) for editing. Click Save on Site B, and it will save as edited. Click Save on Site A and the user received a message that the site already existed. Change the site name and save again. Site A will now save as normal and Site B’s name and address will be overwritten to be the same as Site A’s. This issue has been corrected.

Systems

Extended User Defined Fields

Reported Issue: A run-time error was produced whenever a bad value was entered into a money field. This issue has been corrected.

Reported Issue: On the fifth tab of the Extended User Defined fields, the second and third money boxes are not loading correct values. This issue has been corrected.

Inventory

Stock Adjustments

Reported Issue: The memo that was entered when performing a stock adjustment was not being saved. This issue has been corrected.

Transfers

Reported Issue: When a transfer was received, the user had the ability to edit the received quantity to a number other than what was transferred. This created issues with parts pending transfer out which could never be received. The ability to edit a received quantity has been disabled. The full amount of a transfer must be received in.

Jobs

Appointments

Reported Issue: Users were able to close a job with appointments that had been scheduled but not dispatched. This issue has been corrected.

Change Orders

Reported Issue: Direct expense parts were not being added to the materials list when they were created on a change order. They did appear, however, on the parts reconciliation tab. This issue has been corrected.

Reported Issue: Change orders were not being locked down from further modification after another change order was created. This issue has been corrected.

Invoices

Reported Issue: Tax was incorrectly calculated on invoices containing holdback items. This issue has been corrected.

Issues/Returns

Reported Issue: Parts were incorrectly being added to negative change orders. This issue has been corrected.

Reported Issue: Serialized parts could be issued to a job without the user selecting a serial number. This issue has been corrected.

Materials List

Reported Issue: Sedona crashed when users attempted to add or remove a checkmark from the Stock box on the Materials List. This issue has been corrected.

Recurring

Reported Issue: When an invoice was created for recurring within a job, deferred income records were not created properly. This issue has been corrected.

Timesheets

Reported Issue: Timesheets could be deleted for a closed accounting period. This issue has been corrected.

WeSuite

Reported Issue: WeSuite was not correctly importing labor hours for installation items on a change order. This issue has been corrected.

Point of Sale

Reported Issue: When a user elects to create an invoice, they are prompted to select a specific customer. The system then starts a new miscellaneous invoice with that customer number populated. On entry of the first line item, the user is again prompted to select a customer. This issue has been corrected.

Reported Issue: When the prior POS entry had a tax exempt number entered, the system did not clear out and repeated a tax exempt entry for the current entry. This issue has been corrected.

Reported Issue: A credit card transaction did not pay the item for which it was being charged. The system reported that a “check sale” be entered to account for the payment. This issue has been corrected.

Reported Issue: A run-time error ‘13’ was received from a POS terminal that had been using a barcode scanner to add parts. This issue has been corrected.

Reported Issue: On the POS entry form, when selecting a customer that had multiple sites, and the site selected is one that has a BillTo that is different from the primary Bill To, the customer address area of the firm was filling with the primary Bill To information instead of the site Bill To information. This issue has been corrected.

Reported Issue: Users were unable to process a return when the warehouse did not have available stock of the item on hand. Users received the error “Not all parts requested for this sale are available. The sale cannot be completed.” This issue has been corrected.

Reported Issue: Tax was not correctly updating each time a new part or item was added. This issue has been corrected.

Reported Issue: Sedona would crash when a customer invoice was selected for a customer whose number or site was not found. This issue has been corrected.

Reported Issue: Live credit card transactions did not display the authorization code. This issue has been corrected.

Reports

Commission Due Report*

Reported Issue: This report did not correctly update after a journal entry was created to pay the sales representative. The report continued to show an outstanding amount due despite payment being made. This issue has been corrected.

Deferred Income Audit

Reported Issue: This report was using the invoice and credit dates instead of the posting dates. This issue has been corrected

Deferred Income Creation

Reported Issue: This report was using the invoice and credit dates instead of the posting dates. This issue has been corrected.

Deferred Income Distribution

Reported Issue: This report was using the invoice and credit dates instead of the posting dates. This issue has been corrected.

Deferred Income Revenue Summary Audit*

Reported Issue: This report was using the invoice and credit dates instead of the posting dates. This issue has been corrected.

Deferred Revenue Summary Audit

Reported Issue: This report was using the invoice and credit dates instead of the posting dates. This issue has been corrected.

Income Statement

Reported Issue: The user selected a range of dates outside of the fiscal year for the company (e.g. fiscal year is January-December and the user entered a range of dates 7/1/16-6/30/17). While a message was displayed indicating that dates were needed during the same fiscal year, when the user clicked on OK, the system attempted to use the same dates with the same error message appearing instead of clearing the dates requested. This issue has been corrected.

SedonaSchedule

Batch Billing

Reported Issue: The estimated amount field was displaying four decimal points instead of two for dollar amounts. This issue has been corrected.

Invoices

Reported Issue: The description of the part on the invoice was incorrectly reading the description of the part instead of the service invoice description of the part. This issue has been corrected.

Reported Issue: Invoices addressed to Bill Tos that are marked as requesting email invoices were not adding a checkmark to the box "Added to Email Queue" automatically for use with SedonaEmail. This issue has been corrected.

Service Tickets

Reported Issue: Users could enter negative part quantities on service tickets. This issue has been corrected.

SedonaSetup

Branches

Reported Issue: When selecting File-Print Preview Branches or File-Print Branches within the branch table, nothing would happen. When selecting these options now, the branch report can be previewed and printed.

Usergroups

Reported Issue: When a user had been given a combination of SedonaEmail permissions without any Accounts Receivable permissions, the user was prevented from logging into SedonaOffice. This issue has been corrected.

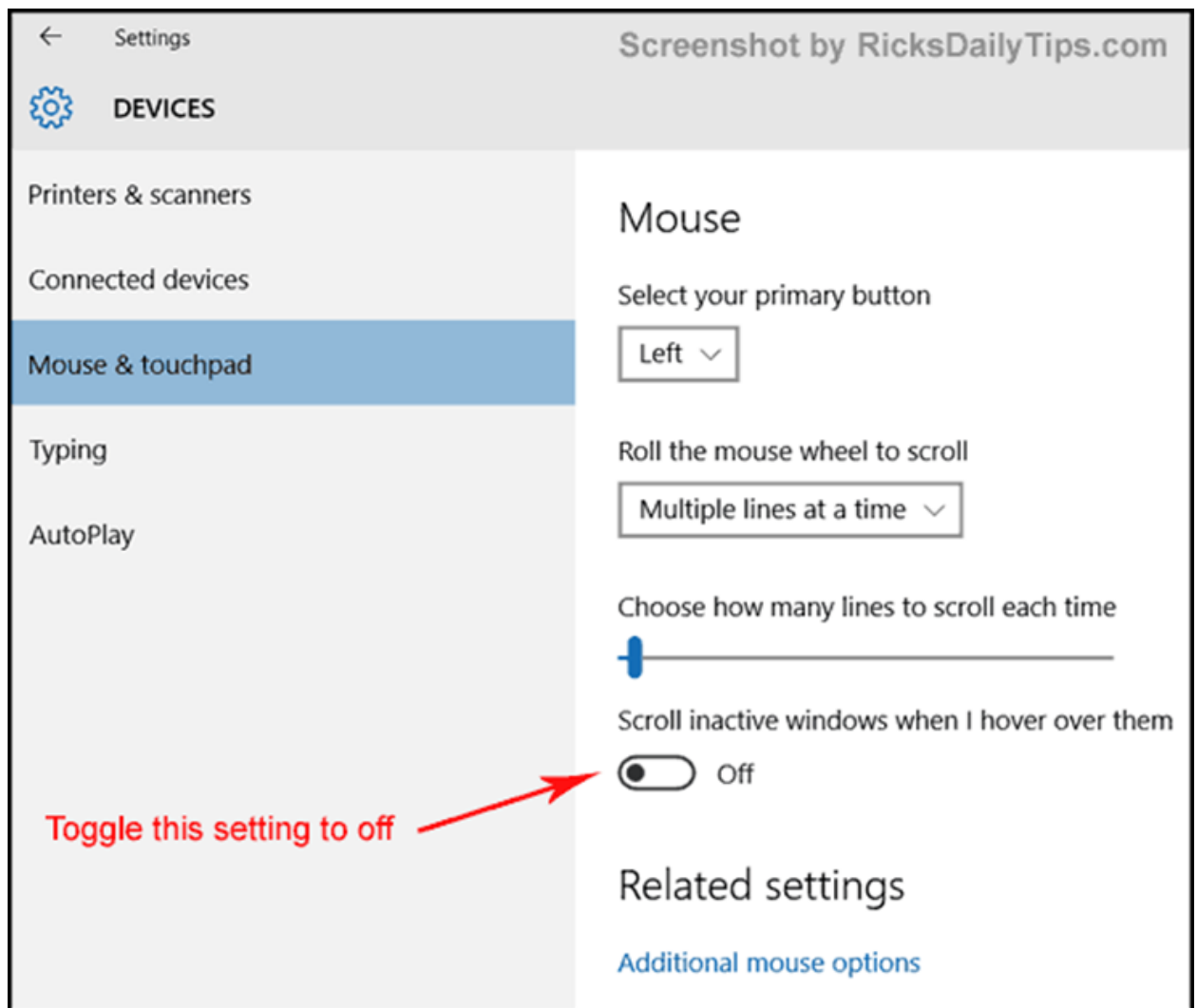
Windows 10 Users

Use of Mouse Scroll Wheel

Reported Issue: Users of Windows 10 report that once they update their system they lose the ability to use the mouse scroll wheel. This is a Microsoft issue and not one involving SedonaOffice. Microsoft recommends the following solution.

1. Click the Start button
2. Click Settings
3. Click Devices
4. Click Mouse & Touchpad
5. Toggle the “Scroll inactive windows when I hover over them” setting to OFF.

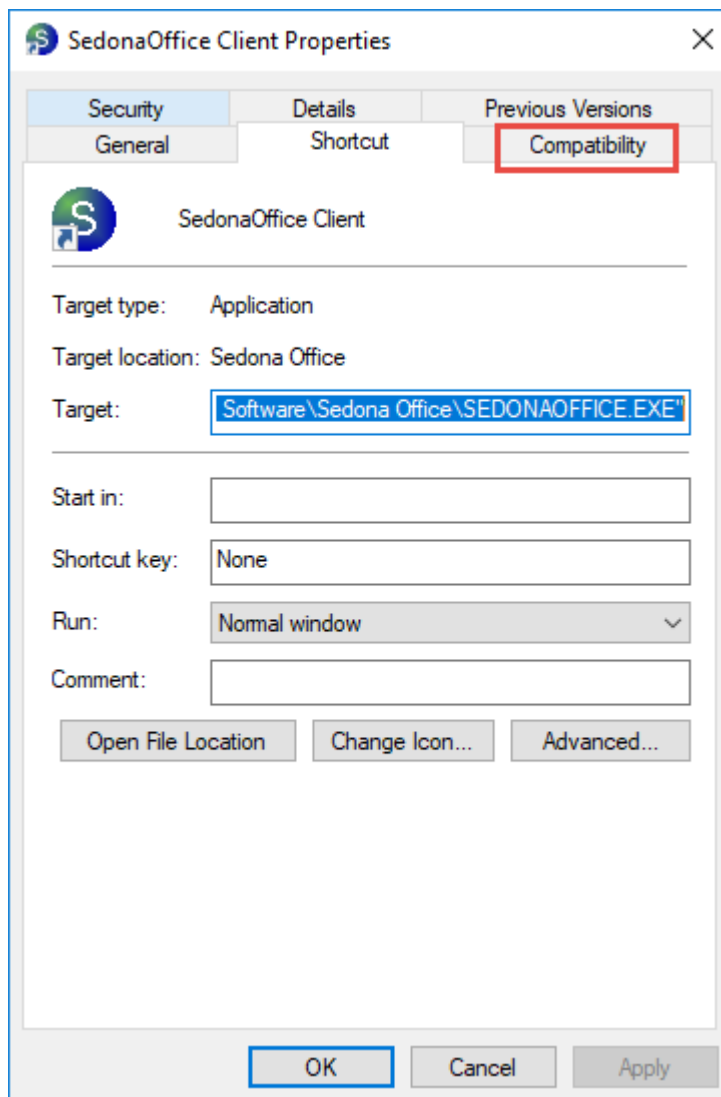
Here is a screenshot that shows the changed setting.



Compatibility

Reported Issue: Some users have reported that Sedona will crash when a checkmark is checked/unchecked in the stock box in version 5.7.89/90. Others have reported crashing in other areas of the program. If a workstation is running on Windows 10, it is important that compatibility be set to Windows 8. To set compatibility, please do the following:

1. Right-click on the SedonaOffice icon on the desktop.
2. Select Preferences.
3. Click on the tab entitled "Compatibility."



4. Place a checkmark in the box entitled “Run this program in compatibility mode for” and select Windows 8 from the drop down. Click OK.

