



Release Notice

Version 5.6.234

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SedonaOffice

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About this Document

This Reference Document is for use by SedonaOffice customers only. This document is not intended to serve as an operating or setup manual, its purpose is to provide an overview of the content contained within, and to be used for reference purposes only.

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Overview

This document is being provided to explain the changes made to the SedonaOffice application since Version 5.6.228. This is an intermediate version update that contains new features and application corrections.

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Application Enhancements/Improvements

Client Management

Central Station Tracking

For SedonaOffice customers that have activated the Central Station Tracking option in SedonaSetup, access to the Central Station Tracking information has been changed. A new button, labeled *C/S Info*, has been added to the bottom of the System form; when clicking on this button the Central Station Tracking options are exposed.

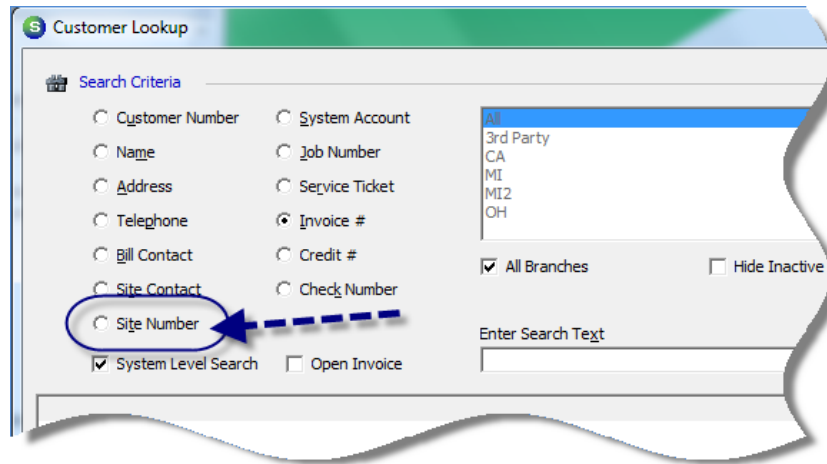
The screenshot shows a software window titled "5774 3350 Intrusion System". At the top, it displays customer information: "Customer: 5774 Michael Johnson" and "Address: 75 Avonwood Road Plymouth, MI 48170". Below this are several tabs: "System", "Custom Fields", "Recurring", "Equipment", "Inspections", and "Notes & Comments". The main area is divided into four sections: "System Information", "Secondary Information", "Service Information", and "Contract Information". Each section contains various input fields and dropdown menus. At the bottom left, there is an "Inactive" checkbox and a "C/S Info" button. A blue dashed arrow points to the "C/S Info" button, which is circled in red. At the bottom right, there are "Save" and "Close" buttons.

Application Enhancements/Improvements (continued)

Client Management (continued)

Customer Lookup

A new search criteria option labeled *Site Number*, has been added to the Customer Lookup.

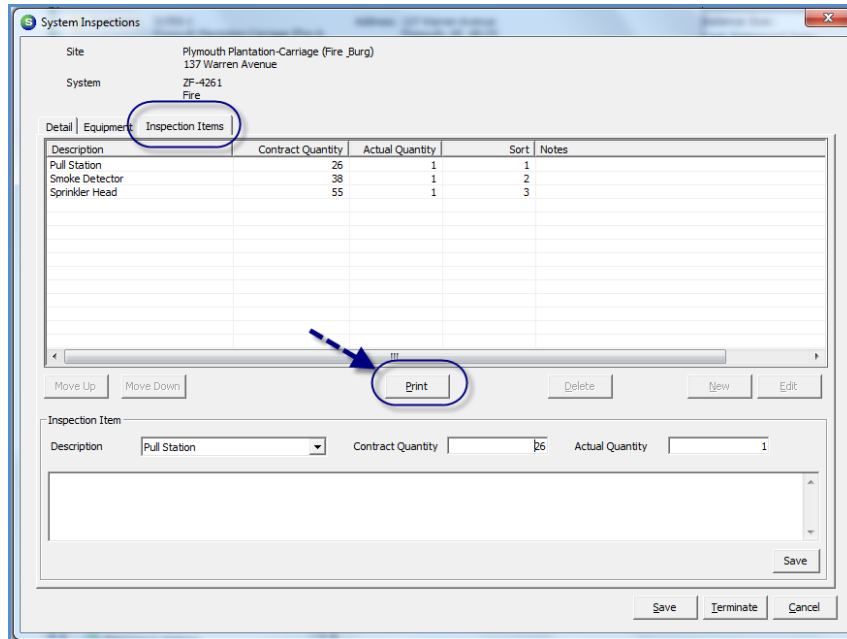


Application Enhancements/Improvements (continued)

Client Management (continued)

Inspection Items Report

A new report has been made available from the *Inspection Items* tab of an Inspection Record. Clicking on the new *Print* button will display the Inspection Items report.



Inspection Items			
Customer Number:	31705-1		
Account Number:	ZF-4261		
Site Name:	Plymouth Plantation-Carriage (Fire & Burg)		
Site Address:	9306 N Lilley Plymouth, Michigan 48170		
Description	Contract Qty	Actual Qty	Note
Pull Station	28	28	
Smoke Detector	35	35	
Sprinkler Head	48	48	

Application Enhancements/Improvements (continued)

Client Management (continued)

Collection Queue

A new column labeled "Last Note" has been added to the Collection Queues. This column will display the text of the last Collection Type note [if any] entered for the customer. This new column will display approximately the first 60 characters of the note.

Customer #	Name	Phone	Last Activity	Follow Up	Status	Amount Due	Credits	Current	1-30 days	31-60 da...	61-90 da...	91-120 d...	over 120	Last Note
24074	Fisher, Katherine					\$922.56								
7880	Harrison High	(734) 456-9201	Auto Put in Queue		Final Demand LTR	1018420.08	0.00	0.00	0.00	0.00	0.00	0.00	1,018,4...	
13353	Chagrin Falls Memorial Hosp		Auto Put in Queue		1st Coll Call	140196.43	0.00	0.00	0.00	0.00	0.00	0.00	140,196...	
40363	Depts. Of The Army & A/F Uspro	(440) 338-3463	Auto Put in Queue		Final Demand LTR	91947.60	0.00	0.00	0.00	0.00	0.00	0.00	91,947.60	
10274	Allied Printing	(517) 643-1101	Auto Put in Queue		Final Demand LTR	35213.83	0.00	0.00	0.00	8,613.64	0.00	45,497.12	1,103.07	
5216	Unison Engine	(517) 649-2888	Auto Put in Queue		Final Demand LTR	41897.56	0.00	0.00	0.00	0.00	0.00	0.00	41,897.56	
14785	Rwp Dairyville Boathouse	(440) 785-9450	Auto Put in Queue		Final Demand LTR	33614.40	0.00	0.00	0.00	0.00	0.00	0.00	33,614.40	
7617	American Cruise Lines	(313) 453-6800	Auto Put in Queue		Final Demand LTR	23475.36	0.00	0.00	0.00	0.00	0.00	0.00	23,475.36	
46764	Trumbull High School		Auto Put in Queue		Final Demand LTR	22106.44	0.00	0.00	0.00	0.00	0.00	0.00	22,106.44	
14029	City Of Detroit	(313) 267-7450	Auto Put in Queue		Final Demand LTR	21810.36	0.00	0.00	0.00	0.00	0.00	0.00	21,810.36	
3359	Chrysalis Center Inc	(313) 263-4400	Auto Put in Queue		Final Demand LTR	20978.88	0.00	0.00	0.00	0.00	0.00	0.00	20,978.88	
21252	Matthews, John	(440) 561-3600	Auto Put in Queue		Final Demand LTR	20572.89	0.00	0.00	0.00	0.00	0.00	0.00	20,572.89	
10142	Trident Alloys	(586) 737-1477	Auto Put in Queue		Final Demand LTR	20550.92	0.00	0.00	0.00	0.00	0.00	0.00	20,550.92	
15612	Trumpf		Auto Put in Queue		Final Demand LTR	20399.31	0.00	0.00	0.00	0.00	0.00	0.00	20,399.31	
107	Carter, Katherine	7342583369	Auto Put in Queue	8/25/2014	Payment Arrange...	19184.10	0.00	0.00	0.00	0.00	0.00	0.00	19,184.10	
16441	Uretek	(517) 468-0342	Auto Put in Queue		Final Demand LTR	18570.24	0.00	0.00	0.00	0.00	0.00	0.00	18,570.24	
18299	Diatco Inc	(517) 635-8234	Auto Put in Queue		Final Demand LTR	17878.66	0.00	0.00	0.00	0.00	0.00	0.00	17,878.66	
3669	United Tool & Die Co.	(734) 246-6531	Auto Put in Queue		Final Demand LTR	17217.09	0.00	0.00	0.00	0.00	0.00	0.00	17,217.09	
20737	Park Place Towers-Access		Auto Put in Queue		Final Demand LTR	16976.38	0.00	0.00	0.00	0.00	0.00	0.00	16,976.38	

Application Enhancements/Improvements (continued)

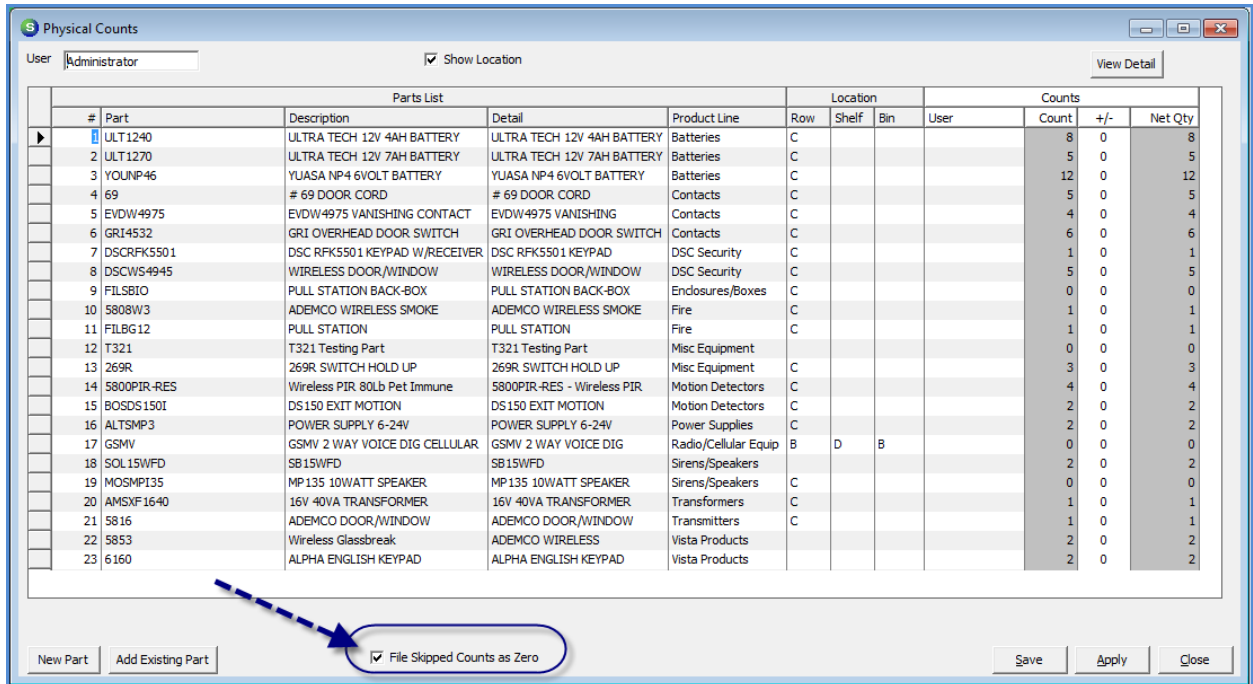
Inventory

Physical Inventory

Changes have been made to the Physical Inventory area.

File Skipped Counts as Zero

The *File Skipped Counts as Zero* option will automatically default to being checked "On" within the Physical Inventory Count Sheet form. This setting will also be remembered when exiting and returning to the Count Sheet.

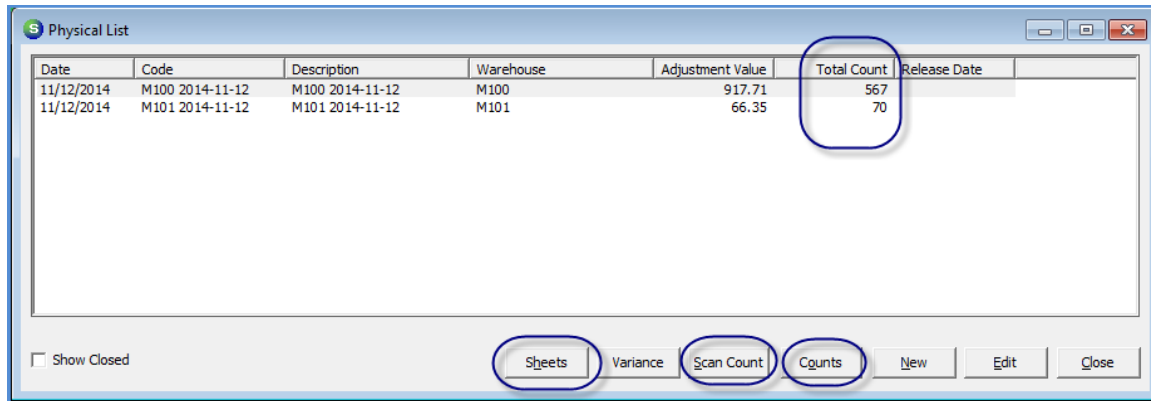


Application Enhancements/Improvements (continued)

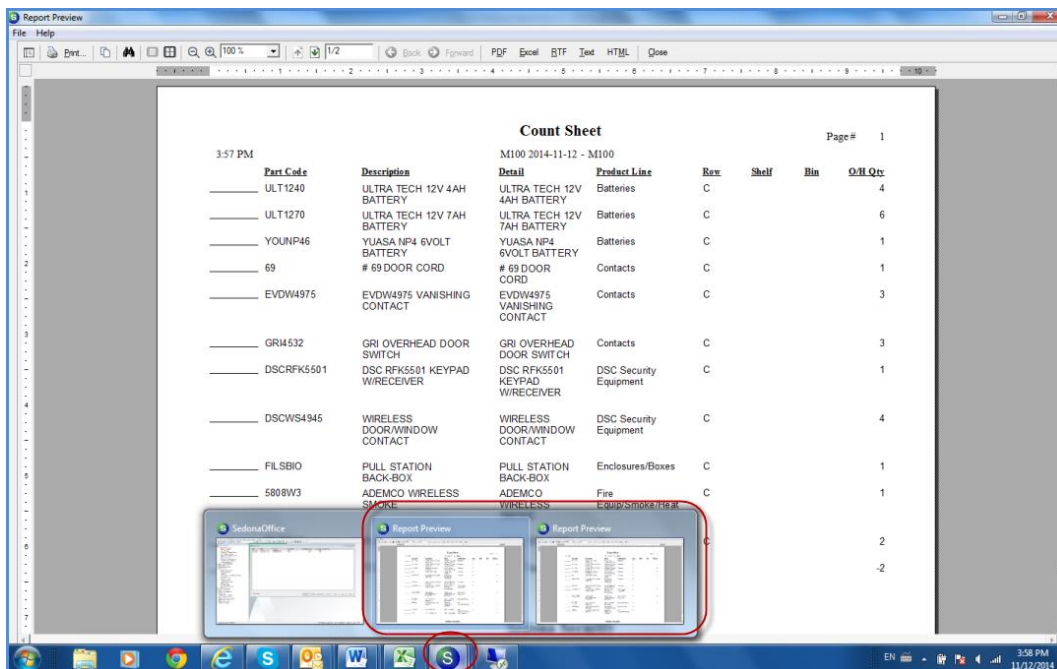
Inventory (continued)

Physical List

A new column and three function buttons have been added to the Physical List display.



- **Total Count column** – this new column will display the total number of parts entered into count sheets for each Physical Inventory.
- **Sheets Button** – When clicking on this new button, the Count Sheet Report will be generated for all Physical Inventories in the Physical List. Clicking on each report on the Windows tray will toggle to each Count Sheet Report for viewing/printing.

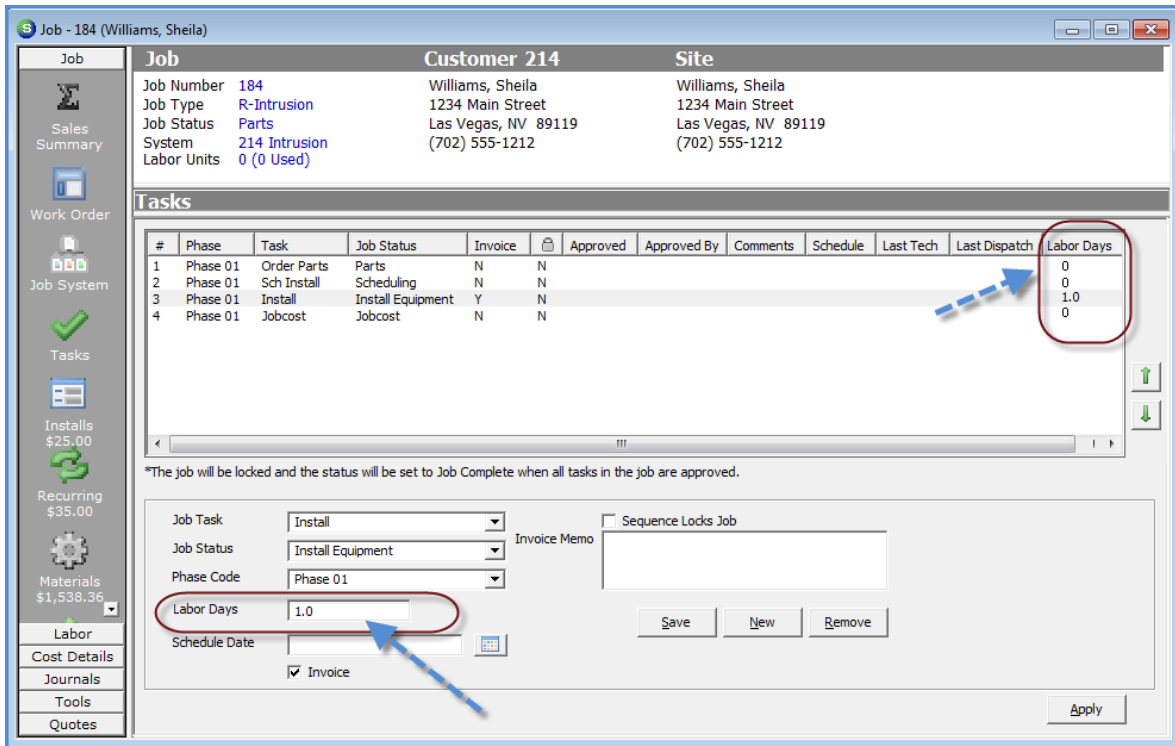


Application Enhancements/Improvements (continued)

Job Management

Job Task – New Field *Labor Days*

A new field, *Labor Days*, has been added to the Job Task form within Jobs. This new field is used in conjunction with the new Job Planner functionality. The value that will default into this field originates from the Job Type Setup. The default days may be overridden on individual jobs.



Application Enhancements/Improvements (continued)

Job Management (continued)

Job Log - Documents

Functionality has been added to write a record to the Job Log when adding a new document, editing document properties or deleting a document.

Job		Customer 102	Site
Job Number	443	Carolina Coffee House	Carolina Coffee House
Job Type	Add On/Upgrade-Com	417 Forest	417 Forest
Job Status	Jobcost	Plymouth, MI 48170	Plymouth, MI 48170
System	102 Access		
Labor Units	0 (0 Used)		

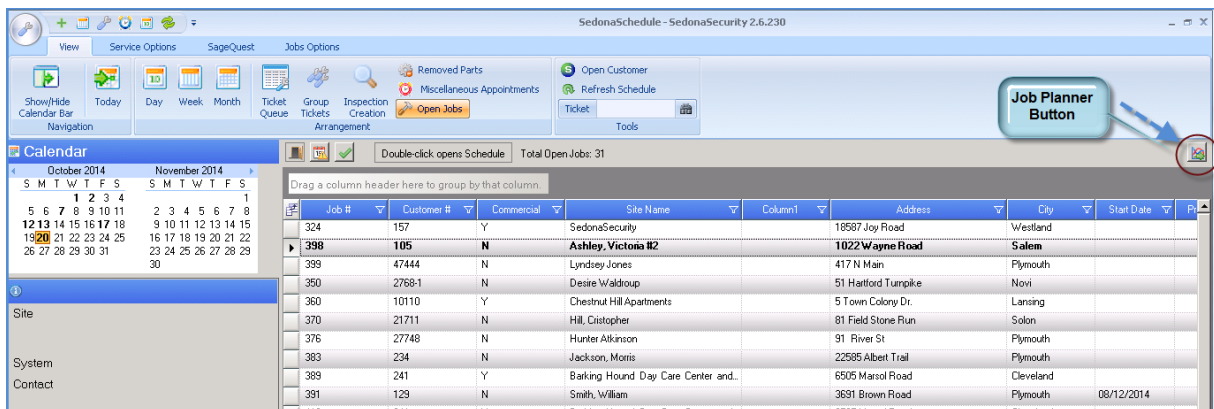
Date	CO	Event	Description	User
11/4/2014 4:53:23 PM	N	Deleted Document	Deleted "New SedonaSecurity.jpg"	Administrator
11/4/2014 4:53:03 PM	N	Edited Document	Edited "New SedonaSecurity.jpg"	Administrator
11/4/2014 4:52:15 PM	N	Edited Document	Edited "COA Template.pdf"	Administrator
11/4/2014 4:51:26 PM	N	Added Document	Added "New SedonaSecurity.jpg"	Administrator
11/4/2014 4:51:26 PM	N	Added Document	Added "COA Template.pdf"	Administrator
11/4/2014 1:52:24 PM	N	Invoice Created For Job	Added Invoice	Administrator
11/4/2014 1:41:48 PM	N	Invoice Created For Job	Added Invoice	Administrator
11/4/2014 1:40:07 PM	N	Approved Job Task	1 Phase 01	Administrator
11/4/2014 1:40:07 PM	N	Approved Job Task	2 Phase 01	Administrator
11/4/2014 1:40:07 PM	N	Approved Job Task	3 Phase 01	Administrator
11/4/2014 1:39:54 PM	N	Added Install Charge	Add-On	Administrator
11/4/2014 1:39:34 PM	N	Added New Job System	New Job System	Administrator
11/4/2014 1:39:28 PM	N	New Job	Added Job 443	Administrator

Application Enhancements/Improvements (continued)

SedonaSchedule

Job Planner

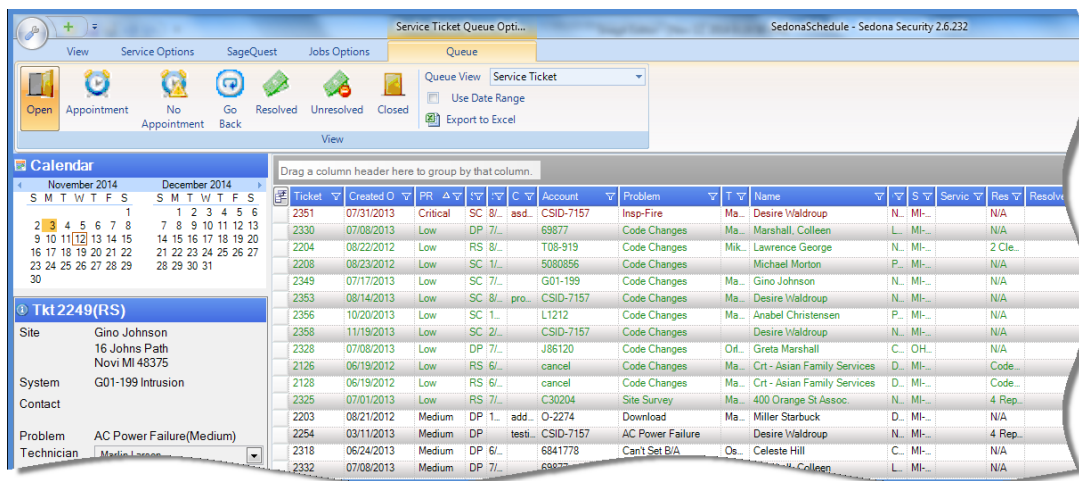
A new feature, *Job Planner*, is being released with SedonaOffice 5.6.234. This new feature is accessed by clicking on a new button located in the banner area within Open Job List. A separate document detailing the setup and functionality will be released in the near future. We will also be hosting a Webinar for all SedonaOffice customers to demonstrate this new feature.



Ticket Priority Color

Ticket #78621

When viewing a Ticket Queue, any ticket with the Priority set to Low, will now be displayed in a green font (same functionality as the "Old" Service Module).



Application Enhancements/Improvements (continued)

SedonaSchedule (continued)

Map, Email & Notes Buttons for Job Appointments

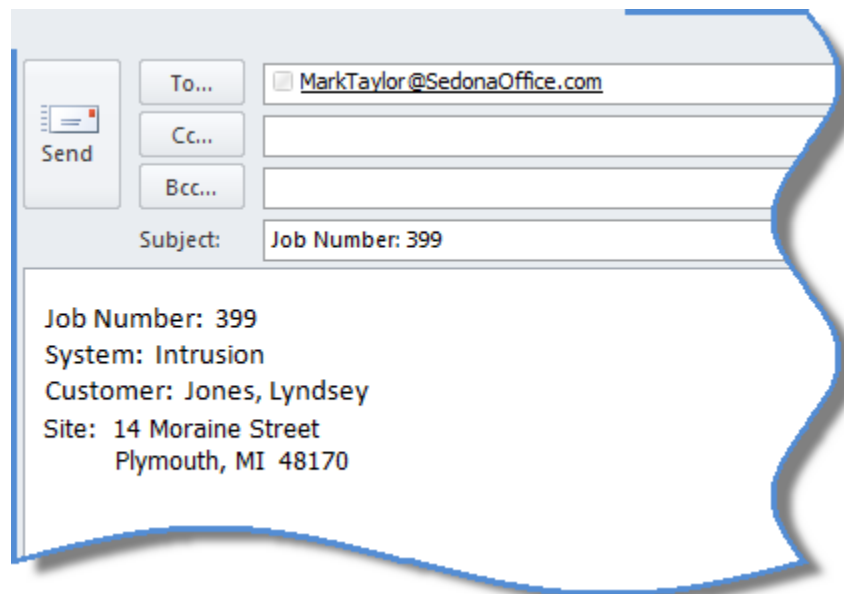
Functionality has been added for the Notes, Map and Email buttons located in the Ticket Detail area for Job Appointments.

Map Button

From the Schedule Board, when clicking on a Job Appointment and then clicking on the *Map* button, the Technician's route will be displayed using the Web Map option selected for the User. If the Technician also has Ticket appointments for the same day, these will be included on the route map.

Email Button

From the Schedule Board, when clicking on a Job Appointment then clicking on the *Email* button, the default email client will open with an email addressed to the Technician assigned to the Job Appointment. Below is a sample of the text that will populate the body of the email.



The image shows a screenshot of an email composition window. The 'To' field contains 'MarkTaylor@SedonaOffice.com'. The 'Subject' field contains 'Job Number: 399'. The body of the email contains the following text:

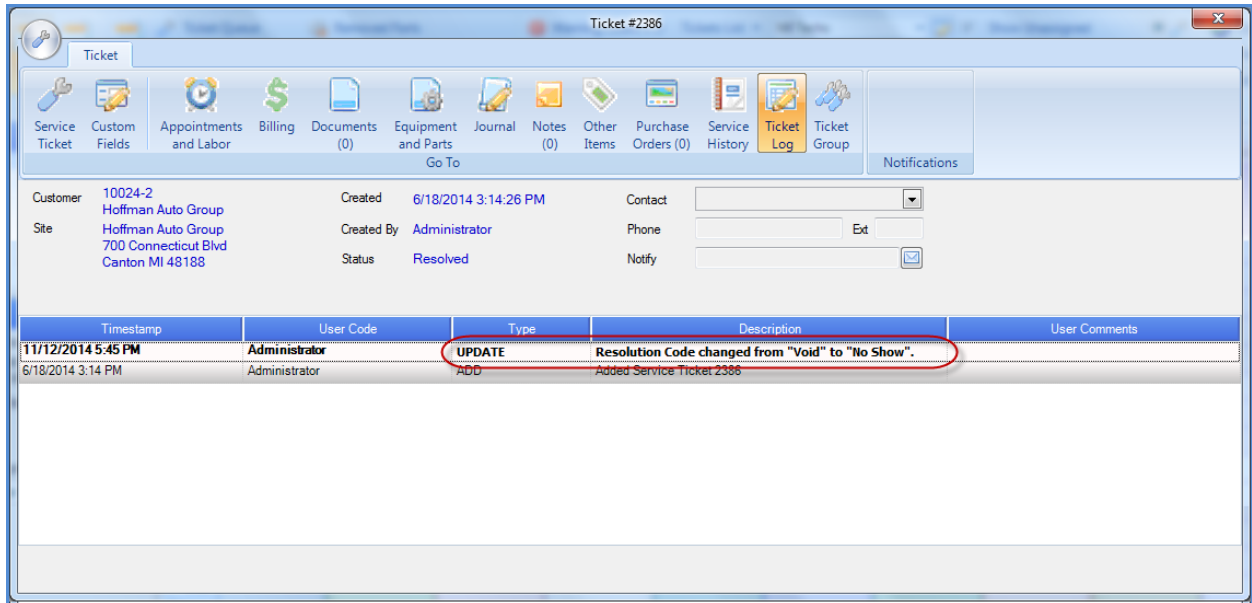
Job Number: 399
System: Intrusion
Customer: Jones, Lyndsey
Site: 14 Moraine Street
Plymouth, MI 48170

Application Enhancements/Improvements (continued)

SedonaSchedule (continued)

Ticket Log

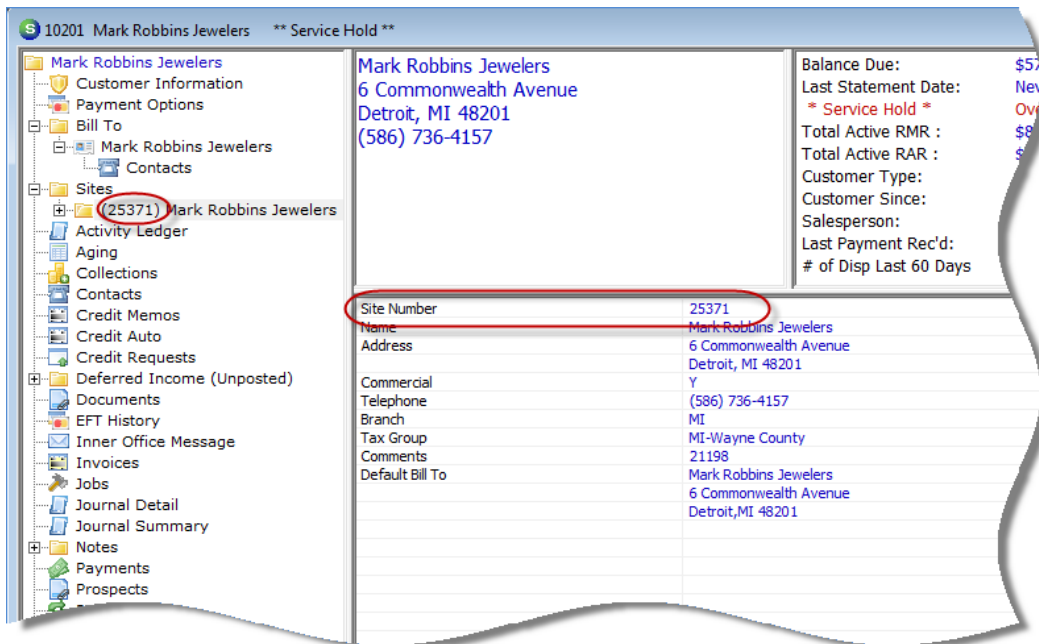
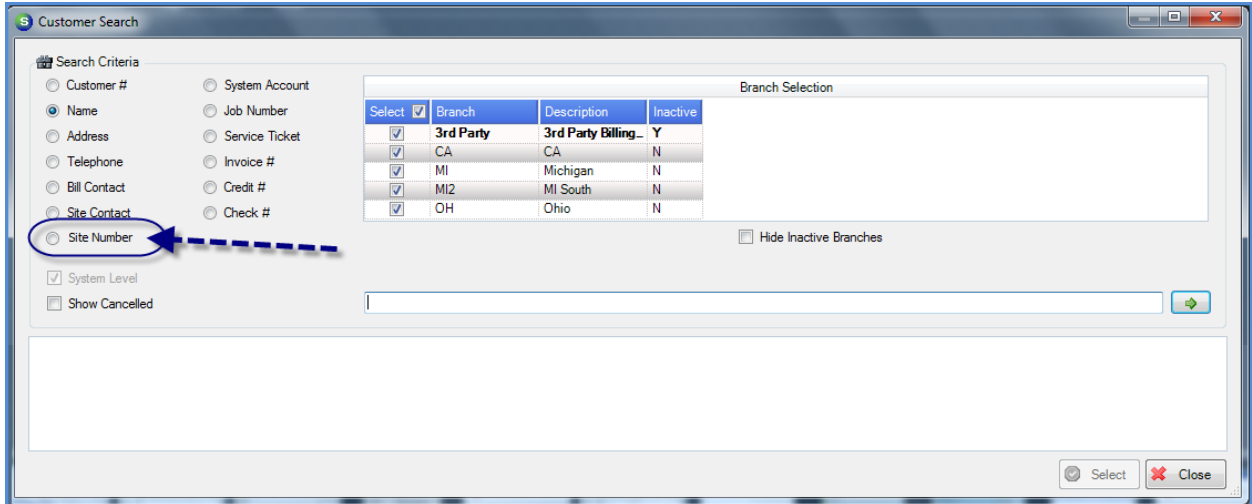
If the Resolution Code of a Ticket is changed by a User, this event is saved and displayed in the Ticket Log.



Application Enhancements/Improvements (continued)
SedonaSchedule (continued)

Customer Lookup

A new search criteria option labeled *Site Number*, has been added to the Customer Lookup.



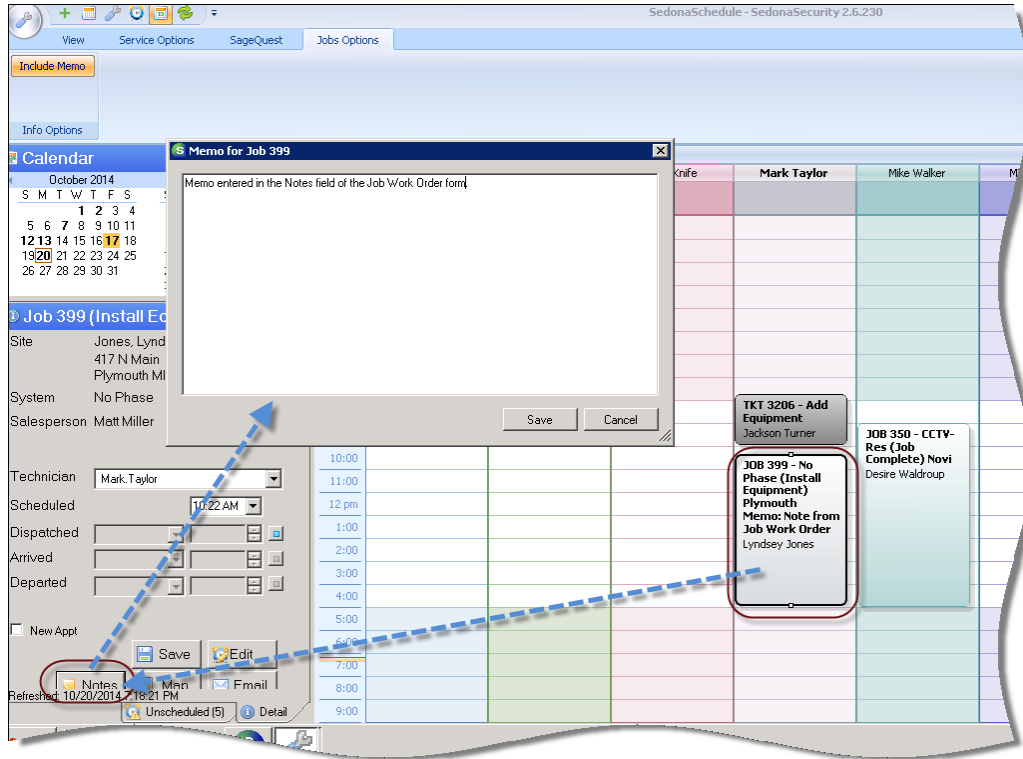
Application Enhancements/Improvements (continued)

SedonaSchedule (continued)

Notes Button

When clicking on a Job Appointment from the Schedule Board and then clicking on the *Notes* button, any text that was entered into the Notes field of the Job Work Order form will be displayed in a pop-up Memo box. If no text was entered into the Job Notes field, Users may manually type in text which will be saved for viewing from Schedule Board.

Note: any text entered into the Memo box from the Schedule Board will not update or change the text within the Notes field on the Job Work Order form.



Application Enhancements/Improvements (continued)

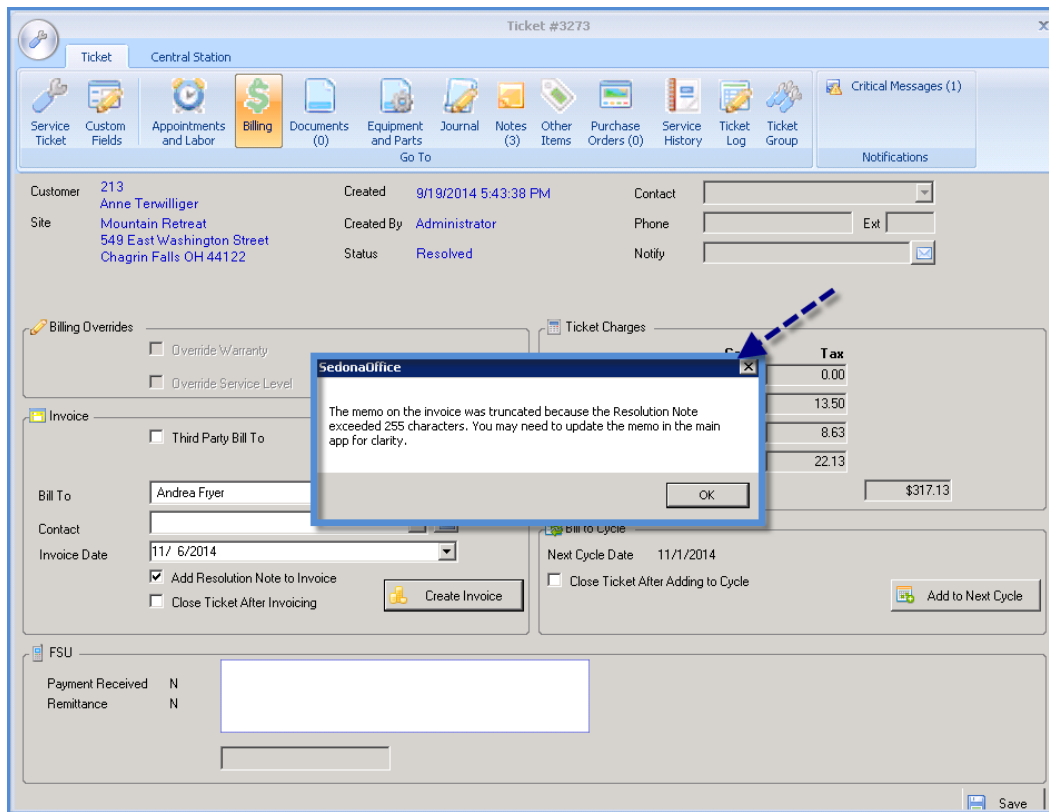
SedonaSchedule (continued)

Ticket Resolution Note

Ticket #76769

When entering a Ticket Resolution Note that exceeds 255 characters, only the first 255 characters are saved to the invoice memo. When creating the ticket invoice on the Billing form of the ticket, if the resolution note exceeds 255 characters, a new message will be displayed to the User:

“The memo on the invoice was truncated because the Resolution Note exceeded 255 characters. You may need to update the memo in the main app [application] for clarity”



Application Enhancements/Improvements (continued)

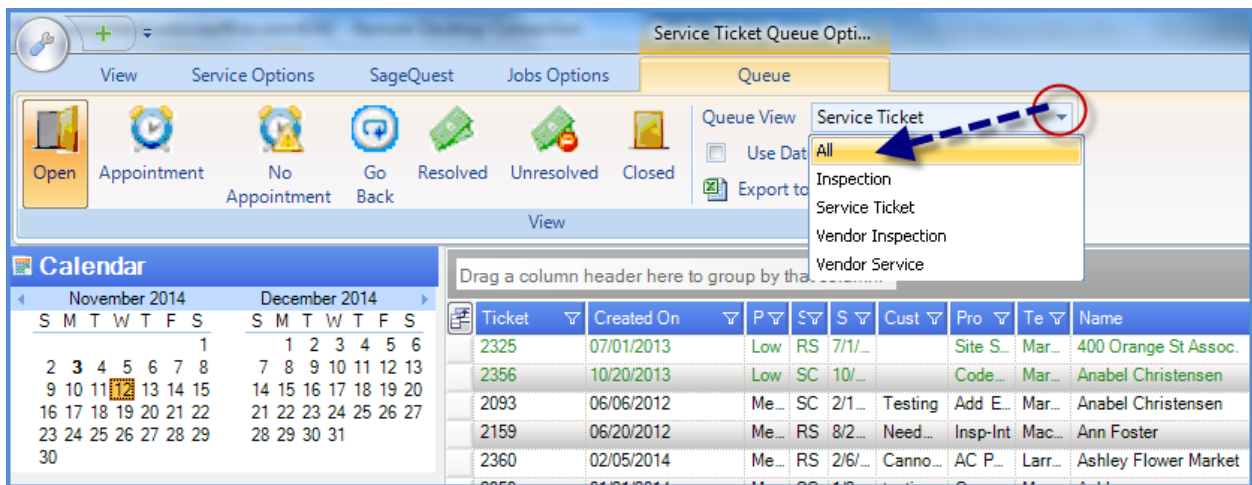
SedonaSchedule (continued)

Selected View Retained

When closing SedonaSchedule and then re-opening, the application will remember the last selected view; Schedule Board, Ticket Queue or Job Queue. For example, the User was viewing the Ticket Queue then logs out of SedonaSchedule. The next time the User logs back into SedonaSchedule, the Ticket Queue will be displayed. Prior to this enhancement, the view would always default to the Schedule Board.

Ticket Queue – All Option

A new option labeled *All*, has been added to the drop-down list of the [Ticket] Queue View. When selecting the All option, all tickets will be listed in the Queue; this includes all ticket types.

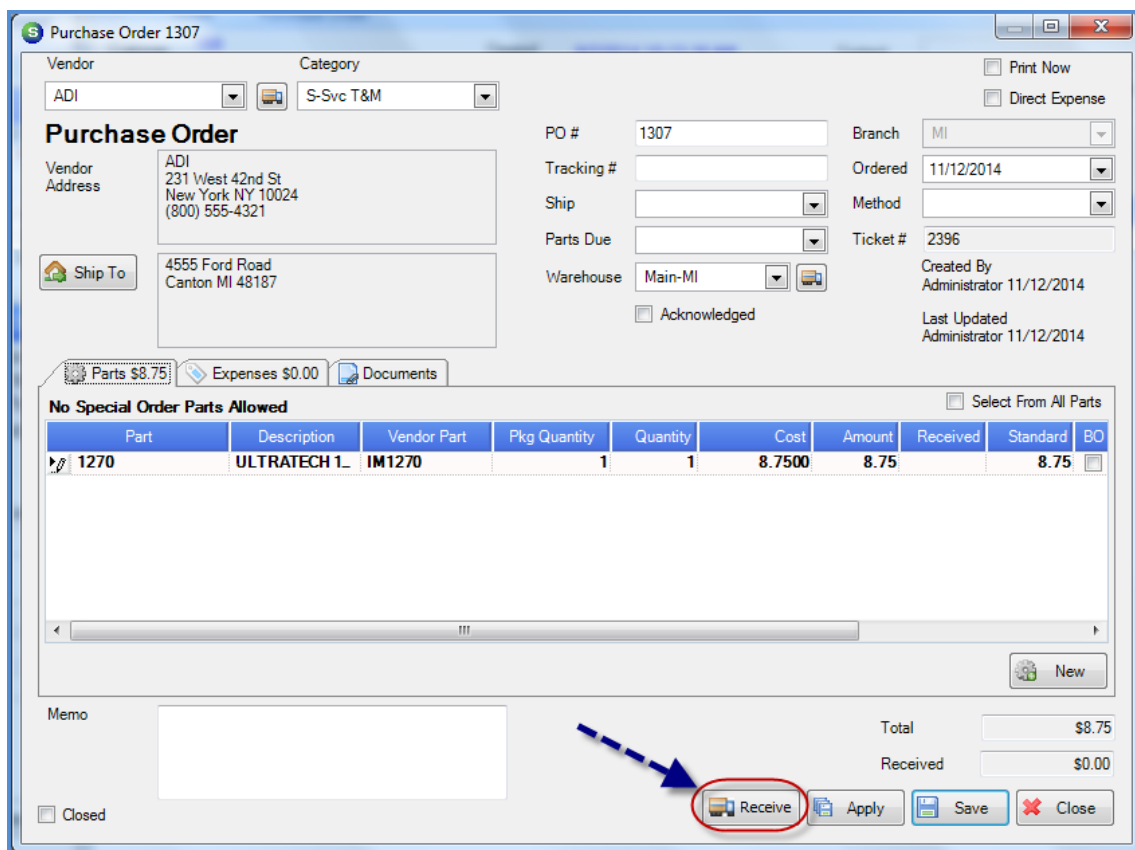


Application Enhancements/Improvements (continued)

SedonaSchedule (continued)

Receive Purchase Order

Users are now able to receive a Purchase Order without having to leave SedonaSchedule. A new button labeled *Receive*, has been added to the bottom of the Purchase order form. When clicking on this button, the main application icon on the Windows tray will begin to blink. The User will click on the main application icon – the Parts Receipt form will be displayed for further data entry and saving the receipt.



Application Enhancements/Improvements (continued)

SedonaSetup

Install Company

A new area along with two new checkboxes, labeled *Weekends*, has been added to the Install Company setup form. Below this new area labeled *Weekends*, are two checkboxes; Saturday and Sunday. If the Install Company is available to be scheduled for a Job appointment on one or both days, then check the appropriate checkboxes. These new options work with the new Job Planner functionality. When updating, both of these new checkboxes are not selected.

Install Company Setup Inactive

Install: Parts WIP:

Description: Misc WIP:

Labor To GL Overhead

Labor Expense Type: Expense at time of entry
 Expense thru WIP

Labor Expense: COS - Jobs-Labor

Labor Deferred: Deferred Labor - Jobs

Labor WIP: WIP - Job Labor

Overhead Debit:

Overhead Credit:

Appointment Options

Dispatch: Yes
 No (Completed Only)

Weekends

Saturday
 Sunday

Timesheet: Auto From Dispatch
 Manual From Arrival

Application Enhancements/Improvements (continued)

SedonaSetup (continued)

Job Tasks

A new field, *Labor Days*, has been added to the Job Task setup form. This new field works in conjunction with the new Job Planner feature. The User may enter up to 999.5 days into this field. If entering whole days into this field, the maximum allowable is 999. If a partial day is entered as other than .5, the application will round all partial days to .5. For example, if 3.1 is entered, the application will save the entry as 3.5 days.

Job Type - Job Tasks

A new field, *Lab Days (Labor Days)*, has been added to the Job Task form within the Job Type setup. This information is used with the new Job Planner feature.

Order	Task	Job Status	Invoice	Lock
1	Sch Prewire	Scheduling	N	N
2	Order Parts	Parts	N	N
3	PW	Prewire	N	N
4	Sch Install	Scheduling	N	N
5	Install	Install Equipment	Y	N
6	Jobcost	Jobcost	N	N

Application Enhancements/Improvements (continued)

SedonaSetup (continued)

Commission Method

A new Commission calculation method has been added to the Commission Type setup. This new method, Est to Gross will calculate an initial commission based on the Install Charges of a job using the percentage of the estimated profit of the Job. When the Job is closed, the software will recalculate the commission based on the actual profit of the Job.

When setting up the commission structure of a salesperson using this new method, you are able to set up a sliding scale just as is currently available for commission methods using the EP (estimated profit) and GP (gross profit) types.

Include Inactive

Commission Type Edit

Code Description Inactive

Commission Calculated Against:

Recurring (R) Estimated Profit (E) Other (O)

Non Recurring (N) Gross Profit (G)

Est to Gross (B) *

Application Enhancements/Improvements (continued)

Report Manager

Commission Due – 100% Paid*

A new report, *Commission Due – 100% Paid**, has been added to the report manager within the Job Management report group. This is a custom report designed by a particular SedonaOffice customer and was built to their specifications.

This report is self-explanatory by the title of the report; once all Job invoices have been 100% paid, the commission amount due to the Salesperson will be listed in the Comm Due column of the report.

Rows will fall off of the report when a User marks the Job Custom Field, “Commission Paid” (checkbox 1).

Commission Due 100% Paid											SedonaSecurity	
Cut-off Date: 10/21/2014												
carolynj - Carolina Johnson												
Job	Customer	Sold	Status	Job Amount	Job Paid	% Paid	Commission	CommRMR	JobRMR	GPM	Comm Due	
377	Anne's Hideaway	5/29/14	Jobcost	3,000.00	0.00	0.0%	75.00	0.00	0.00	100.00%	0.00	
385	The Huntsman Motel	6/17/14	Closed	5,988.00	3,000.00	50.1%	213.91	0.00	0.00	71.45%	0.00	
397	Northville Mem.Hosp.Camera	8/14/14	Closed	105,750.00	113,152.52	100.0%	4,405.98	0.00	0.00	83.33%	4,405.98	
411	Advest Inc.	8/26/14	Closed	37,000.00	0.00	0.0%	925.00	0.00	25.00	98.72%	0.00	
418	Barking Hound Day Care Center	9/13/14	Job Complete	10,000.00	9,775.00	97.8%	500.00	0.00	0.00	94.54%	0.00	
422	Detroit Education Dept.	9/15/14	Jobcost	10,000.00	0.00	0.0%	250.00	0.00	0.00	94.06%	0.00	
											4,405.98	

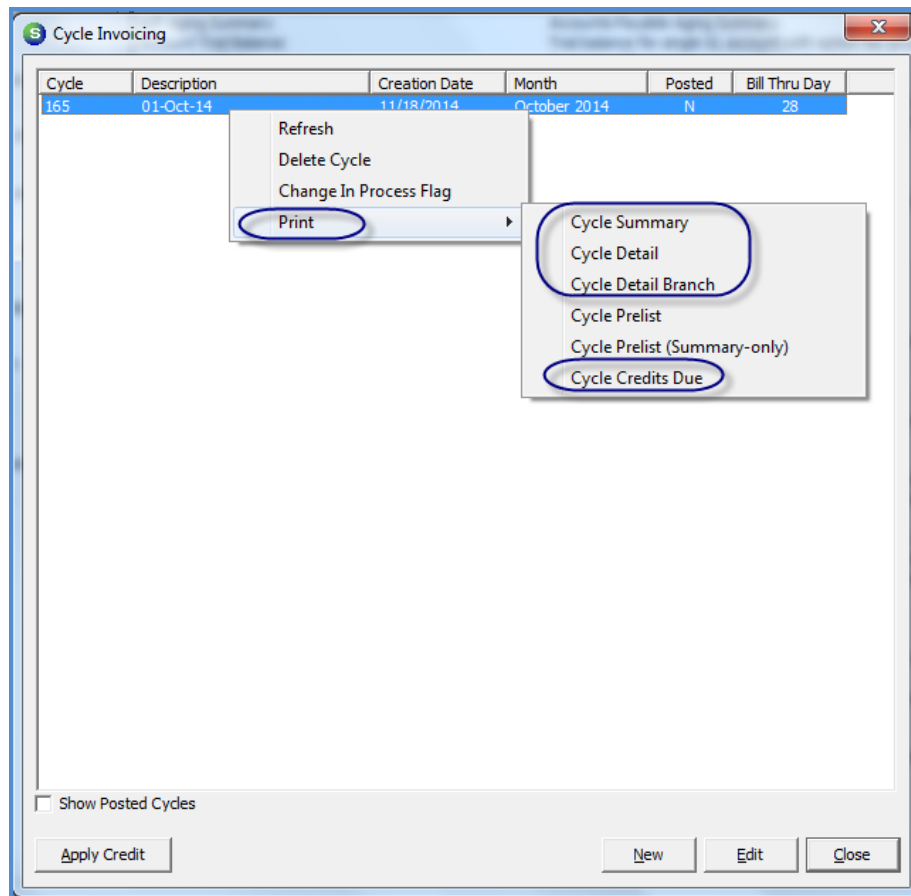
Application Enhancements/Improvements (continued)

Report Manager (continued)

Cycle Billing Reports

The following Cycle Billing Reports have been modified to accommodate international dates and currency format:

- Cycle Summary
- Cycle Detail
- Cycle Detail Branch
- Cycle Credits Due



Application Enhancements/Improvements (continued)

Miscellaneous

Online Help

When accessing the Online Help within the main SedonaOffice application, the workstation's default browser will be used rather than requiring Internet Explorer.

Main Application Buttons

A change has been made to the main application button bar; the camera icon which supported the old document imaging interface, has been removed. This option is no longer supported.



Application Corrections

Accounts Payable

Close No Bill Expected

Reported Issue: If a Purchase Order Receipt has not been matched to an A/P Bill and the Accounting Period for the Receipt is now closed, Users were unable to select the Close No Bill Expected checkbox on the Receipt form. This has been corrected.

Recurring Bills Documents

Ticket# 78725

Reported Issue: When attempting to attach a document to a Recurring Bill, and error message was being received. This issue has been corrected.

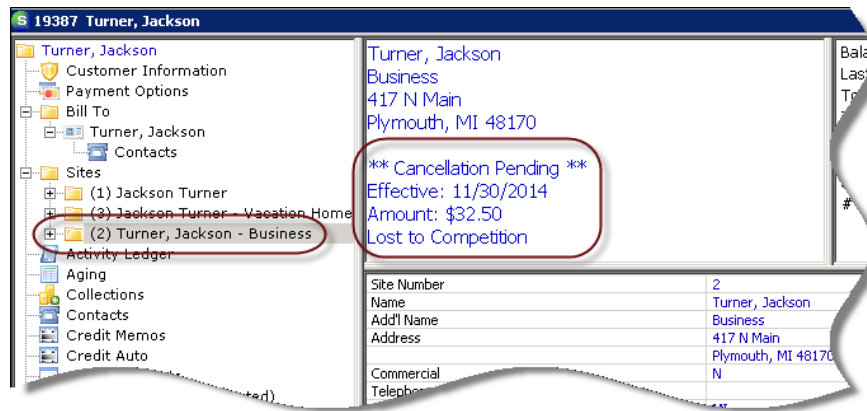
Application Corrections (continued)

Client Management

Cancellations

Ticket# 78329

Reported Issue: When more than one Cancellation Record for the same Customer (each for a different site) was created in the Cancellation Queue, when clicking on the Site within the Customer Explorer, the cancellation information being displayed did not correspond to the correct Site. This issue has been corrected.



Sedona Event Log

Ticket# 78831

Reported Issue: If a Ticket was deleted, the event was not being recorded to the Sedona Event Log along with the Users comments. This has been corrected.

Time Stamp	User Code	Type	Description	User Comments
11/4/2014 5:30:58 PM	Administrator	DELETE	Deleted Service Ticket 3224	deletion of ticket - created on wrong customer
11/3/2014 3:36:06 PM	Administrator	UPDATE	Edited Credit Memo Request 126 Request...	
11/3/2014 3:28:40 PM	Administrator	ADD	Added Credit Memo Request 126 Request...	
11/3/2014 3:22:52 PM	Administrator	ADD	Added Credit Memo Request 125 Request...	
11/3/2014 3:22:52 PM	Administrator	ADD	Added Manual Invoice 234693	
11/3/2014 3:22:52 PM	Administrator	ADD		

Application Corrections (continued)

Inventory

Issue Parts

Ticket# 78147

Reported Issue: When the Inventory Setup flag “Negative Quantities” is set to *Warning Message*, the application would not issue parts to a Job if not enough parts existed in the requested warehouse. This issue has been corrected.

Job Management

Job Task Comments

Ticket# 78105, 78452, 78827, 78829

Reported Issue: With version 5.6.224, a change was made to the application forcing the lock-down of all fields on a Job Task once it was approved by a User. With this current release, the Comments field has been made accessible to enter text after the Task has been approved. Only Users with the appropriate permissions will be able to enter text into the Comments field. User Permission: Job Task Edit.

Application Corrections (continued)

SedonaSchedule

Ticket WIP Material & Labor

Ticket #78071, Ticket #74335

Reported Issue: WIP Material or Labor was not always being relieved on Tickets when the Service Company setup was not flagged to “Expense Inventory on Service Tickets When Invoiced”. This issue has been corrected.

Closed Tickets

Reported Issue: Under certain circumstances, the application was not writing a record to the Ticket Log indicating the Ticket had been closed. This issue has been corrected.

Billing Form – Invoice Amounts Display

Ticket# 78518, 78636, 78747

Reported Issue: Once an Invoice was saved, if any parts were invoiced, the amount for parts was being included in the Labor amounts field. This has been corrected.

Deleted Tickets

Ticket #78831

Reported Issue: When a Ticket is deleted by a User, information that was entered into the Ticket Comments field will be saved with the delete event in the Sedona Event Log.

Open Jobs List

Reported Issue: An error message was being received in situations where the Job List was grouped and the User would double-click within a group. This issue has been corrected

Copy Job Appointment

Ticket #78831

Reported Issue: When a Job Appointment was completely dispatched and the next Job Appointment for the day (for the same Installer) was partially dispatched, when copying the previously dispatched appointment and pasting into the current appointment timeslot, the Job Appointment in progress would become un-editable. This issue has been corrected.

Application Corrections (continued)

SedonaSchedule (continued)

Adding a Document to a Purchase Order

Ticket #63992

Reported Issue: Users were unable to add a new document to a Purchase Order where at least one document was already attached. This issue has been corrected.

Application Corrections (continued)

SedonaSetup

PCI Compliance Update

Reported Issue: When attempting to run the PCI Compliance utility, the correct company was not launching (this only applies to SedonaOffice customers who operate under multiple companies). This issue has been corrected.