

# Version 5.6.128

# **Release Notice**

Last Revised: June 12, 2012

# 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 overview 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 new features and changes made to the SedonaOffice application as of Version 5.6.128. This release notice includes features and options that were added since the release of version 5.6.115. This is an intermediate version update that contains new features, functionality changes, and new reports. Listed below are the modules affected by new features contained in this software release.

- Accounts Receivable
- Client Management
- General Ledger
- Job Management
- Service
- Report Manager
- SedonaSetup



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# **Application Enhancements**

### **Accounts Receivable**

#### **Cycle Invoice Posting**

An option that was available several releases ago which gave the User the option of skipping the customer aging process has been added back to the application. When pressing the Post button on the Cycle Invoicing Process form, the User will be prompted with the question as to whether they want to skip the re-aging of all customer accounts as a part of the posting process.

If your company wants to have this option available, you must contact SedonaOffice Support to activate this feature.





# **Client Management**

#### **Recurring Line Setup – New Invoice Group Number**

A new field, *Invoice Group #*, has been added to the recurring line setup. This field allows you to designate which recurring services will be invoiced on the same invoice within the same site. For example if you want regular monitoring services and service agreements to be on one invoice, and inspection services on a separate invoice, you would set the Invoice Group # accordingly to separate the services on the invoice. In the screen shot below two Recurring Lines are setup with an Invoice Group # 1 and one Recurring Line is setup with an Invoice Group # 2. The two recurring lines assigned to Group 1 will be on one invoice, and the recurring line assigned to Group 2 will be on a separate invoice. Invoice Group Numbers may be between 1 and 9.

Site and System	3 Recurring Edit 9232			
Plymouth Plantation-Bldg A Main House         Plymouth, Plantation-Bldg A Main House           44400 Jay Road         Plymouth, MI 48170           System         FA3223-0           Fire         Panel Type           Vista-128FBP	Site and System Plymouth Plantation Eldg A-Main House 44450 Joy Road Plymouth, MI 48170 System FA3223-0 Fire	Plymouth Plantation 44450 Joy Road Plymouth, MI 45120		
Recurring Setup   Royalties / Commissions	Panel Type Vista-128FBP			
Recurring Information Recurring Item Mon-Fire Description Monitoring Fire System  Sub Item OF  Igl Cycle Quarterly	Recurring Setup Royalties / Commissions	Recurring Edit 9232     Site and System     Pymouth Plantation-Bidg A-Main House     4459 Dyr Road     Plymouth, MI 48170     System FA3223-0	Plymouth Plantation 44450 Joy Road Plymouth, MI 48170	-
RMR Amount         \$60.00           Cycle Amount         \$180.00           Next Cycle         June 2012           Recurring Start         \$/1/2011	RMR Amount \$45.00 Cycle Amount \$135.00	Panel Type Vista-128FBP Recurring Setup   Royalties / Commissions	☐ Third Party Bill To	
Recurring End	Next Cycle June 2012 Recurring Start 5/1/2011 Becurring End Invoice Group # 1	Recurring Item Test&Inspect RMR   Description Test & Inspect Fire System  Sub Item Of   Bill Cycle Quarterly	Renewal Rate Increase Override % 0 PO Number	
		RMR Amount \$68.00	PO Expires Reference	
		Cycle Amount \$204.00 Next Cycle June 2012 Recurring Start \$/1/2011 Recurring End 1 Invoice Group # 2	Memo	
			Sa	ve <u>C</u> los



### **Customer Query Builder – New Fields Added**

Several new fields have been added to the Customer Query Builder. Three new fields are located within the Site Group and are related to the sales tax rate for a Site. These new Site Group field names are: Tax Table, Tax Table Description and Tax Table Rate. A new field has also been added to the Service [Ticket] Group labeled Ticket Invoice Amount. This field represents all charges on the invoice; sales tax is not included in this total.





# **General Ledger**

### **GL** Query Builder – New Field Added

A new field, "Customer Name", was added to the GL Query Builder. This new field is located within the Reference Group.



# Sales Tax Query Builder – New Fields Added

New fields have been added to the Sales Tax Query Builder in four different field groups which relate to the Branch Code and Branch Description. Both of these new fields are located within the following Groups: AR Invoice, AR Credit, Invoice Site and Credit Site.





# **Job Management**

# **Job Costing Security**

A new User Group Security option, "Job Costing Part Button", was added which affects the Job Costing form. A user must now be assigned this security permission in order to use the Auto Part Costing button within the job costing form. If a User not assigned this security permission clicks on the Auto Part Costing button, they will be presented with an "Invalid Security Access" message.

	<u>o</u> de dministrator	D <u>e</u> scription Administrator		Level 3	Credit	Memo Limit 00.00
Ē	Application Access Rep	ort Access				
	Access		Module			*
	Re-Open Job		MC			
	Sales Reversal		MC			
	Payroll Timesheet Entries		MC			
	Job Custom Fields		MC			
0	Job Costing Part Button		ML			
	Payroll Interface		PR			
	✓ Import		PR			
	✓ Timesheets		PR			
	Timesheet Employee Reco	Timesheet Employee Records PR				
	Timesheet Employee Regi	ster	PR			
	View Rates and Amounts		PR			
	Earnings Type		PR			
	Sales Management		QT			-
_						
	Print			<u>A</u> pply	New	<u>D</u> elete





# SedonaService

### Inspection/RMR Link

New functionality is being introduced in this version of the SedonaOffice application which allows the User to link an Inspection Setup to a recurring line. This functionality is controlled by a new option setting on the Service Level Setup. A new tab has been added to the Service Level setup form which indicates if a User is required to link a Recurring Item when setting up a new inspection. If the Service Level selected on the Inspection setup is not required to be linked to a recurring item, the linking fields on Inspection setup form will be hidden.

If a recurring line that is linked to an Inspection record is cancelled, the application will automatically terminate the Inspection record(s) linked to the recurring line effective on the date the recurring is being cancelled.

#### **Inspection Setup Enhancements/Changes**

Several new fields and a new button have been added to the Inspection setup form, most of which are being put in place for future functionality, but some which may be used in this version of the application. These new fields and button will be described on the following page.

- Recurring Item Link
- Cycle Amount
- Service Tech
- Group Number
- Estimated Hours
- High Frequency Omit
- Terminate (button)

A new button, Terminate, has been added to the Inspection setup form. Previously a Delete button was available to remove an Inspection record; this button is no longer available. If an Inspection needs to be removed, the User will now use the Terminate button which will stop Inspections as of the date the Terminate button is pressed and confirmed.

**Note:** Since Inspections are terminated on the date the button is pressed, the User needs to look at the next inspection date to make certain the termination is occurring on the correct date. For example, if the Next Inspection Date is set to 06/01/2012 and the June Inspection ticket has not yet been created, if we terminate the Inspection today (June 11, 2012), then the June Ticket will still be created by the application. To prevent un-wanted tickets from being created, make certain that the next inspection date is at least equal to the termination date.



#### Inspection Setup Form – New Fields/Buttons Definitions

- **Recurring Item Link** This field will only be exposed if the Service Level selected on this form is flagged to require linking to a recurring item. When clicking on the drop-down arrow, all active recurring lines for the Site will be listed from which to select.
- **Cycle Amount** If a recurring line was selected in the Recurring Item Link field, this field will display the cycle amount of that recurring line.
- Service Tech (optional) This field is available to select any active Technician as the preferred person to perform the Inspection. If a Technician is selected in this field, when Inspection Tickets are created, this Technician's name will display on the front page of the Inspection Ticket and in the Technician field within the Ticket Queue. Selecting a Technician on this setup form does not schedule an appointment; this is for reference purposes only.
- Group Number This field is for future development.
- Estimated Hours (optional) This field is used to enter an estimated number of hours required to perform the Inspection. This is for informational purposes only and is displayed in the header area of the Appointments and Labor form of the Inspection Ticket.
- High Frequency Omit This field is for future development.
- **Terminate** (button) Pressing this button will terminate the Inspection as of the date on which the button is pushed. The User will be presented with a confirmation message prior to the termination occurring.

System Inspections	2 Proved Syncer				terms has	x
Site Plymo 4445	outh Plantation-Bldg A-Main House 0 Joy Road					
System FA32 Fire						
Detail Equipment						
🔍 Inspection ————						_
Description	Q-Fire Inspection		Service <u>T</u> ech	Egor Earle		
Frequency	Quarterly	•	<u>G</u> roup Number	0		
Service Problem Code	Inspection	•	Estimated Hours	2		
Service <u>L</u> evel	INSP Contract	•	High Frequency Omit (Duplicate			
Ser <u>v</u> ice Company	MI		Inspection)			
Last Inspection Next Inspection	4/15/2012		Notes			
			Notes		<u>^</u>	
Recurring Item Link Cycle Amount	Test&Inspect RMR					
	1204.00				Ŧ	
Charges						-
	Inspection Item			•		
	Amount 0.0	0				
				Sav	/e (Ierminate) G	ancel



# SedonaSetup

Changes have been made within SedonaSetup with this release of SedonaOffice. Make certain to review the changes carefully to determine if they will affect your company.

#### **User Group Security**

A new permission setting has been added to the application as of this release; this new user group permission is described below.

# Job Costing Security

A new User Group Security option, "Job Costing Part Button", was added which affects the Job Costing form. A user must now be assigned this security permission in order to use the Auto Part Costing button within the job costing form. If a User not assigned this security permission clicks on the Auto Part Costing button, they will be presented with an "Invalid Security Access" message.

C <u>o</u> de Administrator	Description Administrator		Level Credit Memo Limit						
Application Access R	eport Access								
Access		Module	A						
Re-Open Job		MC							
Sales Reversal		MC							
Payroll Timesheet Entri	es	MC							
Job Custom Fields		M							
🚺 🗹 Job Costing Part Butto	n	ML							
Payroll Interface		PR							
✓ Import		PR							
<ul> <li>Timesheets</li> </ul>		PR							
Timesheet Employee R	ecords	PR							
Timesheet Employee R	egister	PR							
View Rates and Amour	ts	PR							
Earnings Type		PR							
Sales Management		QT	-						
Print			<u>Apply</u> <u>N</u> ew <u>D</u> elete						



# Service Level (SV)

A new tab has been added to the Service Level setup forms. This new form labeled "Inspection", has been added to facilitate the new functionality in linking an Inspection Record to an existing Recurring Line. If this new option is selected, when creating or modifying an existing Inspection Record assigned to this Service Level, the User must link the Inspection to an active Recurring Line for the customer site.

Service Levels											
Service Levels											
Service Level	Description	Parts	Labor	Other	Bill As	Trip Ch	Labor Item	Other Item 🔺			
90-Dav T & M Full Service	90-Dav T & M Full Service	N Y	N Y	N Y	Min Svc Call Min Svc Call		Service Labor	Min Svc Call			
INSP Contract	INSP Contract	Y	Y	Y	Min Svc Call	4	Service Labor				
Inspection T & M		N	N	N	Min Svc Call		Insp T & M	=			
Leased System	Leased System	Y	Y	N	Min Svc Call		Service Labor	-			
Maintenance Co	. Maintenance C	N	N	N	Min Svc Call	\$65.00	Service Labor				
				_				· •			
•	III							4			
Include Inact	ive										
Service Level E	1:4										
Service Level Ed	110			_				Inactive			
Service Level	INSP Contract				Description	INSP Contra	ict				
General Par	Inspecton										
General Fran	Inspector							1			
RMR Link to Customer Recurring is Required											
*This option is used in Service Inspections to force a link between the inspection and customer RMR.											
	<u>A</u> pply <u>N</u> ew <u>D</u> elete										



# **Report Manager**

One new custom report has been added to the Report Manager list along with changes to three existing reports.

#### Jobs WIP Monthly Audit\*

This report is designed to print any changes in WIP [Work in Process] for a selected date range. The report is grouped by Job Branch, with a page break after each Branch. This new report was designed for a specific SedonaOffice customer.

#### Jobs Cost Summary (JC05)\*

A new sorting option was added to this report which allows a User to sort by Job Created Date.

eneral				As of Date	Sales
<ul> <li>All Open Jobs (including</li> </ul>	g jobs closed a	íterAs of Date)		6/12/2012	
C All Jobs with Projected I	End Date Betv				
C All Jobs Sold Between				Options	
C All Jobs Closed Betwee	n			🔲 Summary Only	
C Accounting F		C Dates	-	Print Notes	25
12 12/01/11 - 12/31	/11		G	Sort By	
12 12/01/11 - 12/31	/11			Job Number	리 는
				Job Number	
anches		Current Job Status		Created On	Install
✓ Bad Debt	*	Approvals	*	Accrual Com-CCTV	
🗹 CA	=	I AT		Cell Backup	
CHI CLT		Branch Complete		Cell Backup Lease Com CCTV Holdback 10%	V
FL-South		Change Order Change Order Approval		Com CCTV w/Parts	× ×
V ISI		Closed		Com-Access	. 🗸
<b>H</b>	Ψ.		Ŧ		11113
Hide Inactive Branche	\$	Hide Inactive Job Statuses		Hide Inactive Job Types	
Select All Invert	Selection	Select All Invert Select	ion	Select All Invert Selection	

# Jobs Cost Summary (JC05) WIP\*

A new sorting option was added to this report which allows a User to sort by Job Created Date.

3 Job Cost Open WIP	
Branches Bad Debt CA CHI CLT FL-South SI	As of Date 6/12/2012  Options  Summary Only  Print Notes
F Hide Inactive Branches	Sort By
Select All Invert Selection	Job Number Solesperson Created On



# Job Profit/Loss

The following new options have been added to this report: Use Original Closing Date, Group By Branch and Include Salesperson on each line.

S Job Profit/Loss	x
Department	Salesperson
All Accounting Administration Customer Service Installation Sales-Comm	All System Administrator E Barney Barber Sam Blais Jeff Craig
Sales-Resi Service	Project Manager Al Ben Bainbridge X-Bailey Barr Jeff Craig Matt Evans
Sold Date Sold From Sold To	Job Type
Completed Date	Sort
Completed From Completed To	Site Name
⊂ Options	
Show Each Job (Don't Show Summary)	Group By Branch Include Salesperson on Each Line
	Ok Cancel

#### **Payments Received**

A new option was added to this report: Page Break After Branch.

Payments Received	×
Branch Bad Debt CA CHI CLT Florida South ISI Louisiana ✓ Show Each Branch ✓ Page Break After Branch	Date Range



# **Application Corrections**

# **Accounts Payable**

#### Pay Bills from Vendor Explorer

A correction has been made to a reported problem in Bill Payment. If a User right-clicked on the Bills option within the Vendor Explorer to pay a bill and then changed the branch name in the payment posting section, the application would close.





#### Pay Bills from Accounts Payable Menu

When Bills were paid using a discount, the amount of the Discount Taken was not printing on the check remittance; this has been corrected.



#### **Purchase Orders**

Corrected a problem in Purchase Orders where selecting a standard cost part that does not exist in the warehouse for the Purchase Order, was not setting the standard cost to the purchase cost when the Purchase Order was received.



#### **Accounts Receivable**

#### Credit Memos

Corrected a problem where the system was allowing a User to delete a credit memo with recurring items where the deferred income had already been posted.

#### **Statement Printing**

A problem was corrected in statement printing where if the User selected the "Show Open Credits" option, the open credits would not always print on the Customer Statements.

#### Invoice Printing – Standard Invoice Form

When printing invoices using the Standard Form and selecting to use Background shading, the document was not being rendered with shading; this has been corrected.

#### **Miscellaneous Invoices**

Under certain circumstances the application was allowing a User without access to accounting periods with the Re-Open status permission to edit an invoice. This has been corrected.



# **Client Management**

#### **Customer Query Builder – Exporting Queries**

Under certain circumstances, a User without permissions to Export Queries was able to do so; this has been corrected.

#### SedonaDocs – Document Type

The application has been corrected to now alphanumerically sort the drop-down list of Document Types.



# Inventory

#### **Repair Order List**

Corrected a problem in the Repair Order List of open repairs where the system would error if the Material Handlers option is activated.

#### Job Purchase Orders

A problem has been corrected for Job Purchase Orders (for parts) that were being received using the "Receive and Issue Immediately" option. If the parts were being received to a warehouse where the part had not previously been setup with a standard cost, the part was being issued to the Job at \$0.00 cost. The application has been changed to use the purchase cost on the Purchase Order if a standard cost does not exist for the warehouse.



# **Job Management**

#### Job Materials

A problem was corrected for Jobs imported from either QuoteWerks or WeEstimate where the application was not using the default setting for stock items.

	🗿 Part E	dit								×		
	Part 4	67		Inactive								
	@Part Detail   ∰ Vendors   @ Alt. Parts   ➡ Warehouses   □Custom Fields   □Documents (0)     Description							ients (0)		1		
		Detail 4 Product Line 1 Manufacturer 7	2V Battery 67 12V Battery Battery Ademco 67			•	± ₽ ª	rt Kit ecial Orde istomer Ec ock Item F	quipment			
	-	Notes	_	_	_		F F	eeze All Po	Jinthasing	5		
S Job - 323 (Mill	er, Anne) Job		Customer	000	0	Site	_	_	Ì	_	_	
dot Sales Summary	Job Number 322 Job Type Res Job Status Par System 875	si-Intrusion	Miller, Anne 12345 Main Plymouth, M (734) 555-19	I 4817		Mille 1234 Plym	r, Anne 5 Main outh, MI 4 ) 555-1999			Ι		7
Work Order	Materials											
			Г	Show	Phases						5	
DBD						[	Materia					PO Cost PO D.
Job System	Part 6150	Description LCD Keypad	Vendor ADI	Qty 1	Location	Unit Price 0.00	Ext Price 0.00	Tax 0.00	0	sued Qty 1	Stock Item	46.99 6150
- 😓 - I	998PI	998PI Motion Detectors	ADI	2		0.00	0.00	0.00	0	2		10.92 998PI
Approvals	VISTA-40	Vista-40 Panel	ADI	1		0.00	0.00	0.00	0	1		163.30 VISTA
Tasks	467 *	12V Battery	Batteries P	1		0.00	0.00	0.00	0	0		0.00
Installe				_	-	_						

#### Job Ticket (Report)

A spelling error was corrected in the Appointment section of Job Ticket printing.

CJM Security 517 Forest Plymouth, MI 48170	7	J	ob Ticke	t	
(999) 444-1111		Job Number 317	Sold Date 2/14/2012	Salesper George.M	
		Job Type Resi-Intrusion	Install Company CA-Southern	Project Ma	mager
Cust# 9223		Job Status Parts	System Type Intrusion	Install	er
Site: Lauren Burns 1234 Main		Permit 1	Permit 2	Permit	:3
Runge, TX 7815 (210) 555-1212 Appointments:		System Account:	9223		
Nome Mark Jones	Scheduled 6/7/2012	Dispatched	Arrived	Departed	Est Time 360



### Miscellaneous

#### **Payment Calculator**

Corrected a problem where you could not copy and paste the Amortization schedule when using the Payment Plan tool.



Once a Payment Plan has been calculated, click anywhere in the calculated payments area then press CTRL-C to copy the payment schedule. Alternately to copy the payment information, you may click on Edit on the main application menu, and select the Copy option. You may then open Excel and paste in the payment schedule.

Payment Calculator					×	SedonaOffice		Acres in the		
oan Amount	8500.00			ment Amount	779.28	File Edit View S Copy	SedonaOffice Cu Ctrl+C	ustomer Query	Tools Window H	Help   ☶     ☵   [王] 🧐     🕋 🖂
Interest Rate	18.0000			al Payments	9351.36	Sedor Paste	Ctrl+V 🖾		S Payment Calculat	
Payment Starting Bal	Amount 779.28	interest	Principal	Balance		Accounts Re			Loan Amount	8500.00
1 2 3 4	779.28 779.28 779.28 779.28 779.28	127.50 117.72 107.80 97.73	651.78 661.56 671.48 681.55	7848.22 7186.66 6515.18 5833.63		General Ledge     Accounts Page     Accounts Page     Accounts Page     Accounts Page			Interest Rate	18.0000
5 5 7	779.28 779.28 779.28	87.50 77.13 66.60	691.78 702.15 712.68	5141.85 4439.70 3727.02		🕀 🥻 Job Manager 🕀 🍣 Payroll Inter	rface		Number of Payments	12 Amount
8 9 10 11	779.28 779.28 779.28 779.28	55.91 45.05 34.04 22.86	723.37 734.23 745.24 756.42	3003.65 2269.42 1524.18 767.76		Sales Manag     Service			Starting Bal 1	779.28
12	779.28	11.52	767.76	0.00		General Doc	Maintenance		3 4	779.28 779.28 779.28
						Management	t Summary		5 6 7	779.28 779.28 779.28
						SedonaSetu	p		8 9	779.28 779.28
					glose				10	779.28 779.28 779.28 779.28



#### SedonaService

#### Ticket Part

A problem was reported where Users were able to make changes to Parts on Closed Service or Inspection Tickets. This has been corrected; the application will no longer allow any changes to be made to Parts on Closed Tickets.

#### Appointments on Closed Tickets

A correction has been made to stop a User from scheduling a new technician appointment for tickets where the status is set to Closed. The quick schedule button and Dispatch menu buttons have been disabled for closed tickets.

Service Ticket	Appointments Billing Doc	umots Equipment Journal Go To	B Service Ticket	ket Appointments and Labor	\$ Billing	Documents (0)	Equipment and Parts	Journal io To	Not (f
Customer Site	10294 Gilbane Gilbane 306 Pearl Street Cleveland OH 48105	Create Quick Schedule I Dispatch menu b been removed fr Tickets.	Customer Site	10472 Plymouth 9 Plymouth 9 212 N Mai Plymouth 1	Spring Cor in		Cr	reated reated By ratus	
Regular Overtime Holiday	Labor Hours 0   0   0	Rate 80.00 120.00 160.00	Regular Overtime Holiday	Labor Hours 2.5 0 0		Rate	80.00 120.00 160.00	о Т -	Fotal I Fax Fota
Name	Appointment	Dispatched	Name Mark Taylor		Appointmen 5/21/2012		Dispatched 6/5/2012		



#### Service Purchase Orders / Tracking Numbers

If a Tracking Number was entered on a Purchase Order created for a Service Ticket, that number was not being displayed once the Purchase Order was saved. This has been corrected.

Address W (2	DI 7247 Cartier Dr /ixom MI 48393 248) 624-6050		(	Tracking #	ABC3698741		Ordered
A Ship To	248) 624-9540 JM Security 50 Magnolia iverside, CA 92			Ship Parts Due	06/11/2012 06/11/2012		Method Ticket
Part	Description	Vendor Part	Pkg Quantity	Quantity	Cost	Amount	Received
•/ 467	12V Battery	AD467	1	2	7.3400	14.68	

#### Service Purchase Orders

If a User began to create a Purchase Order within a Service Ticket, they would have to complete the process and save the Purchase Order; the Purchase Order Close button did not function properly to back out of the process. This has been corrected. A User is now able to press the Close button without completing and saving the Purchase Order.



# Service Schedule / Tickets on Site

When clicking on the Ticket List drop-down, the Site Ticket List has now been expanded to view the information for other open tickets for the same site.

Show/Hite         Logy         Use         Month         Queue         Group         Miscellaneous Aprei         39398         06/11/2012         SC         Ins           Calendar ar         Arrangement         Arrangement         Image: Calendar arrangement </th <th>Warning Count = 32 Trekets U     Show Unassigned     Show Unassigned     State     Address     City     State     Spection     Plymouth Plan     44450 Joy Road     Plymouth     MI</th>	Warning Count = 32 Trekets U     Show Unassigned     Show Unassigned     State     Address     City     State     Spection     Plymouth Plan     44450 Joy Road     Plymouth     MI
Show/Hide         Today         Day         Week         Month         Queue         Removed Parts Group         Ticket         Created         ST         Pre- intexts           Awrigation         Week         Month         Queue         Miscellaneous Appeir         39398         06/11/2012         SC         Ins           3 due 2012         July 2012         S         1 <th>oblem Name Address City State</th>	oblem Name Address City State
Show/Hide         Today         Day         Week         Month         Queue         Group         Genoved Parts         Ticket         Created         ST         Pro           Calendar Navigation         Miscellaneous Appoint         39398         06/11/2012         SC         Ims           June 2012         July 2012         S         Miscellaneous Appoint         Image: Comparison of the parts         Image: Compart         Image: Comparison of the parts <t< th=""><th></th></t<>	
Image         July 2012         July 2012         Image	spection Plymouth Plan 44450 Joy Road Plymouth MI
Image: Contendar         Image: Contendar<	
S M T W T F S         S M T W T F S         S M T W T F S         S M T W T F S         Image: Comparison of the state of the st	
S         M         T         S         G         W         T         F         S         M         T         T         F         S         M         W         T         F         S         M         W         T         F         S         M         W         T         F         S         M         W         T         F         S         M         W         T         S         T         W         T         S         T         W         T         S         T         W         T         S         T         W         T         S         T         W         T         S         S         M         W         T         S         S         M         W         T         S         S         M         W         T         S         S         M         W         T         I         S         S         M         M         M         T         I         I         M         I         I         I         I         I         M         M         M         I         I         I         I         I         I         I         I         I         I         I         I	
1 2 1 2 3 4 5 6 7 3 4 5 6 7 8 9 8 9 10 11 12 13 14 10[1] 12 13 14 15 16 15 16 17 18 19 20 21 12 am	
3 <b>4</b> 5 6 7 8 9 8 9 10 11 12 13 14 1011 12 13 14 15 16 15 16 17 18 19 20 21 12 am	
17 18 19 20 21 22 23 22 23 24 25 26 27 28 24 25 26 27 28 29 30 29 30 31	
2:00	
3:00	
4:00	
39397(SC) 5:00	
Site 🔺 Plymouth Plantation-Bldg A-Main House 6:00	
44450 Joy Road 7:00	
System FA3223-0 Fire 8:00	ТКТ 39397 - ТКТ 39398 -
	ection (Low); Taylor,
10:00	
roblem Inspection(Medium)	

#### Service Schedule / Drag & Drop Scheduling

When using the drag and drop method of scheduling technician appointments on the Service Schedule Board, the application was not automatically updating the ticket status to SC (scheduled). This problem has been corrected.

#### Service Schedule / Drag & Drop Job Appointments

A problem was corrected where certain SedonaOffice customers were able to drag and move Job Appointments on the Service Schedule Board. This functionality has been disabled.

#### Service Appointments

A problem was reported where the appointment departure time was automatically filling in when scheduling a new technician appointment; this issue has been corrected.

#### Miscellaneous Appointments

- A reported problem was corrected that allowed a User to schedule a miscellaneous appointment without selecting a Technician. The application has been corrected to only allow a Miscellaneous Appointment to be saved if at least one Technician's name has been selected.
- A problem has been corrected that allowed a User to type in and save invalid characters within the Appointment Type field. The application has been changed to not allow the saving of a Miscellaneous Appointment without a valid selection from the drop-down list within the field.

#### Invoicing Service Labor

A problem was reported where the application was rounding the unit hourly labor rate on the customer invoice, but the total extended amount was correct on the invoice. This issue has been corrected.

#### Invoicing Viewing Permission

A problem was reported where a User has to be granted permission to Edit Existing Transaction in A/R to be able to view an invoice from a Service Ticket. The application has been corrected to no longer require this permission to view a service invoice..

#### Inspection Tickets – Service Company

A problem was reported where the Service Company that automatically defaults into Inspection Tickets was the System Service Company where it should have been the Service Company selected on the Inspection Setup form. This issue has been corrected.

#### Service Ticket Part Quantities

A problem was reported where the application would not allow a quantity of a Part to be less than 1. This issue has been corrected.

#### Service Ticket Form Changes

A problem was reported where the application would not save any changes made to the Service Ticket form and no warning message was presented to the user prior to navigating to a different form on the ticket. The application has been changed to present the User with a warning message that information has been changed on the current form.



# Reports

#### Accounts Receivable - AR Retroactive Aging

Corrected a problem in AR Retroactive Aging where the report would sort by Customer Number even when Customer Name was selected for the sorting option.

#### Accounts Payable - Open Receipts & Open Receipts Detail

Corrected a problem where the Open Receipts and the Open Receipts Detail reports were not matching the total amounts.

#### Job Management – Job Cost Summary (JC05)\* & Job Cost Summary (JC05) WIP\*

Corrected a problem where JC05 and JC05 WIP reports gave an error message when trying to sort by Salesperson.