SedonaOffice
The #1 Financial Software for Security Companies

Version 5.6.156

Release Notice

Last Revised:

September 26, 2012

About this Document

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Overview

This document is being provided to explain the new features and changes made to the SedonaOffice application since the last released Version 5.6.154. This is an intermediate version update that contains new features and application corrections.

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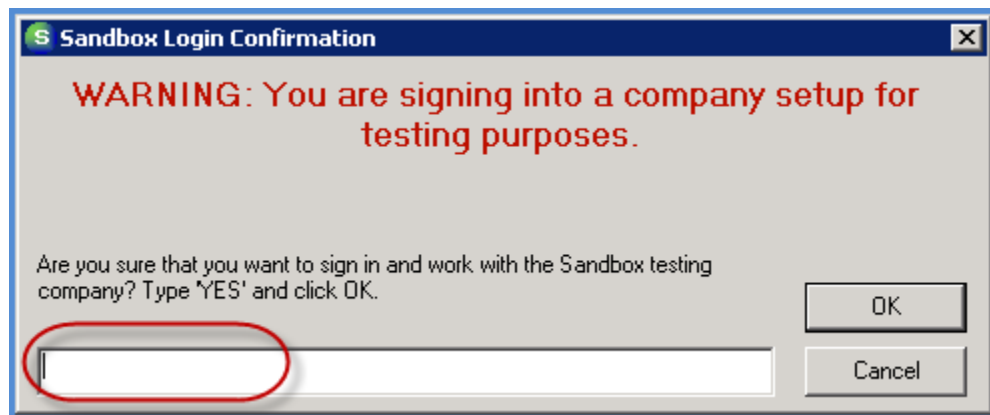
Application Enhancements/Improvements

General

Login to Sandbox Company

A change was made to the application to display a Login Confirmation form when a User selects to login to a company containing the word "Sandbox". The User must type the word **Yes** into the white text box then click the OK button to be able to open a Sandbox company.

Application Enhancements/Improvements (continued)

Job Management

Job Phase Invoicing

An enhancement has been made to the application which now allows you to perform Job Invoicing by Job Phase.

If your company is using Job Phases (setup on the Job Type in SedonaSetup), you may select a Phase for Install Charges and Parts on the Materials List.

The time at which charges are available for invoicing is determined by the Job Task List. If a Job Task line is flagged as an Invoicing Line, when that task is approved, only Install Charges and Parts assigned to the Phase code on the approved task will be included in the invoice. The only exception to this is RMR Charges. If there is unbilled RMR on the Job, this may be included on the invoice at any time.

Job Task List with Invoicing Phase Assignments

Application Enhancements/Improvements (continued)

Job Install Charges with Phase Assignments

Job Material Charges with Phase Assignments

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Application Enhancements/Improvements (continued)

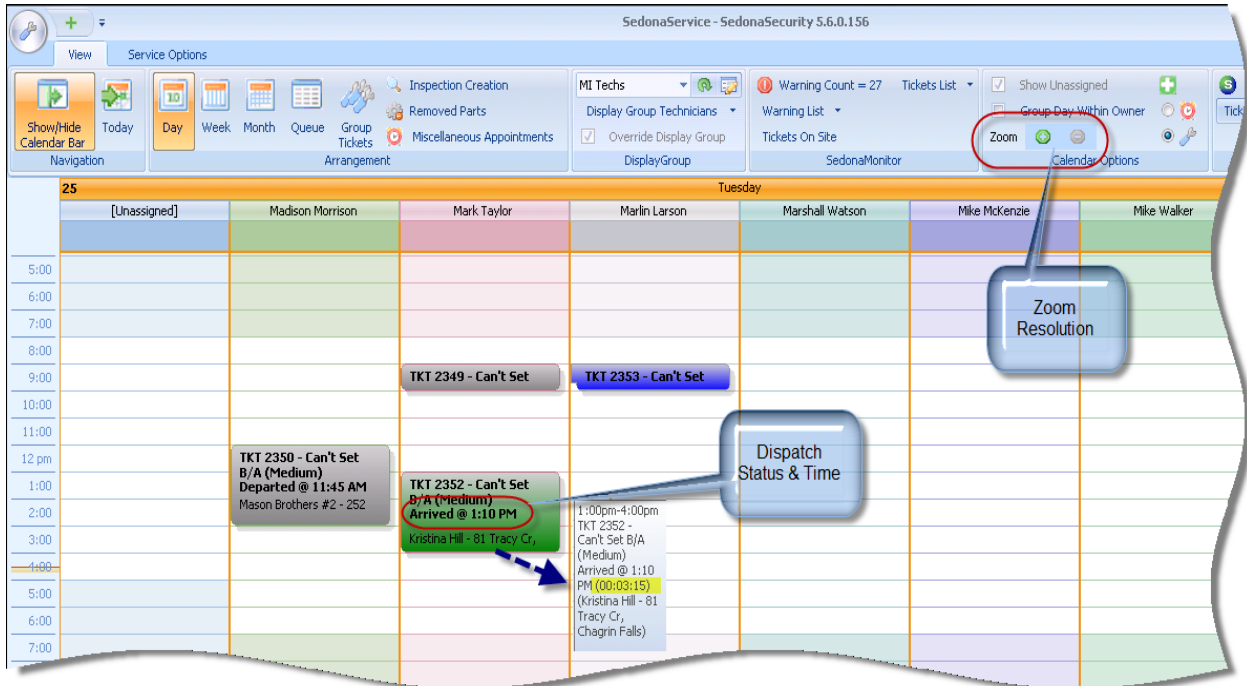**Job Invoicing List - New *Phase* Column**

Application Enhancements/Improvements (continued)

SedonaService

Dispatching – Elapsed Time & Dispatch Status

An enhancement was made to the Information Bubble of a Technician Appointment on the Service Schedule Board to display additional information. If an appointment has been dispatched or arrived, when hovering over the appointment on the Schedule Board, the amount of elapsed time since the dispatch time or the arrival time will be displayed. The format in which the elapsed time is displayed is dd:hh:mm (days/hours/minutes). In the screen shot below, the Technician has been on site for three hours and 15 minutes.

The application is now displaying the current Dispatch Status of appointments on the Schedule Board. Once an appointment has been dispatched, arrived or departed, the dispatch status along with the time of the dispatching event will display in the appointment information bubble. Depending on the length of the appointment and the workstation Zoom resolution, you may be able to see the Dispatch Status without hovering over the appointment.
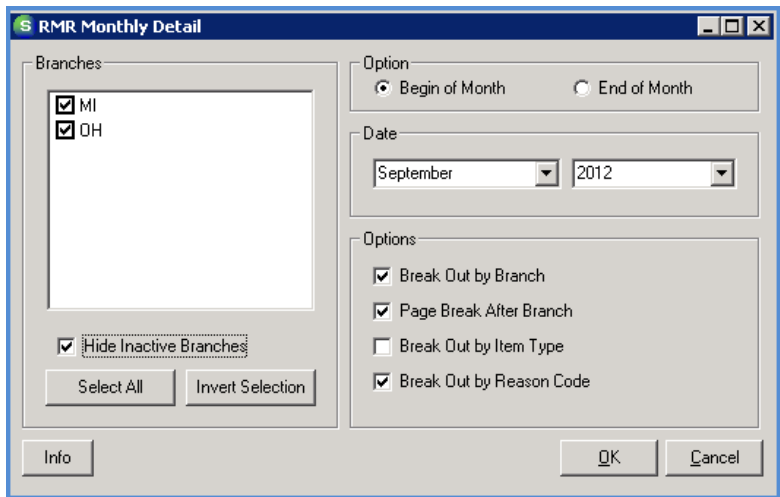
Application Enhancements/Improvements (continued)

Report Manager

RMR Monthly Detail Report

A new report, RMR Monthly Detail has been added to the Report Manager within the CM reporting group. This report provides a list of RMR changes for any single month in the RMR 12 Month RollForward* Report.

Job WIP Monthly Audit* Report

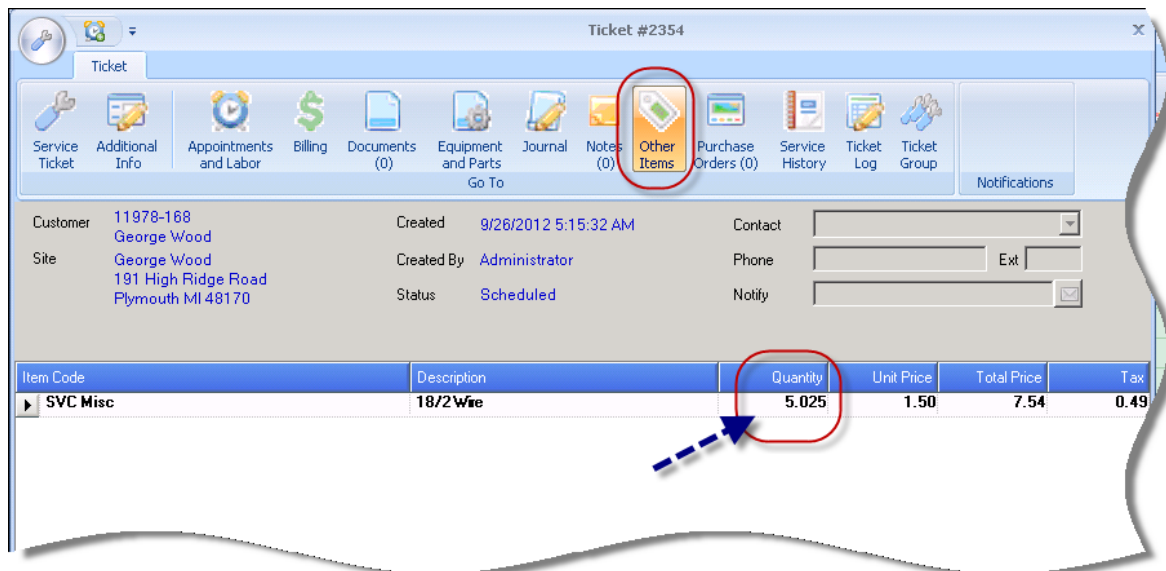The Job WIP Monthly Audit* Report has been enhanced to now include Jobs which have been Reversed.

Application Corrections

SedonaService

Other Items

A problem was reported where the application was rounding quantities to the nearest whole number. The quantity field will now accept quantities with up to three decimal places.

Parts Used

Corrected a reported problem when tabbing through a part on a service ticket, the quantity was re-setting to 1; the quantity will no longer reset unless a different part code was entered in that cell.

Parts Search

A problem was reported where the parts search results list would display multiple times when a part entered contained the same values as one or more other parts in the warehouse. This problem has been corrected.

Custom Fields

A reported problem where a value entered into a money formatted custom field was not saving the entered value and a beeping noise was sounded when switching to that tab. Both of these issues have been corrected.

Application Corrections (continued)

Invoiced Service Labor Rate

A problem was reported where labor rates that were <u>not</u> whole dollars were not displaying the correct rate once the service invoice was posted. The calculation for the extended amount on the invoice was correct. The application has been corrected to display the correct rate on the invoice.

Application Corrections (continued)

Accounts Receivable

Job Invoice Credits

A problem was reported where the application was over-applying unapplied cash or credits to Job Invoices under certain circumstances. The over-application of funds would only occur during the posting a Job Invoice where both an advance deposit and an unapplied cash item or an unapplied credit memo that was marked as future apply for Job Invoices were being applied to the invoice.