

Version 5.6.164 Release Notice

Last Revised: December 06, 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 provide an overview of the content contained within, and 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, be sure to check our website at <u>www.sedonaoffice.com</u> for the most current version. Copyright 2008, 2009, 2010, 2011, 2012.

Overview

This document is being provided to explain the new features and changes made to the SedonaOffice application since the last released Version 5.6.159. This is an intermediate version update that contains new features and application corrections.



Table of Contents

ABOUT THIS DOCUMENT	2
OVERVIEW	2
APPLICATION ENHANCEMENTS/IMPROVEMENTS	4
Accounts Receivable	4
Cycle Invoice Group Number	4
Client Management	6
Equipment Move	
APPLICATION CORRECTIONS	7
Main Application	7
Accounts Receivable	9
Client Management	11
Inventory	13
Job Management	14
SedonaService	15



Application Enhancements/Improvements

Accounts Receivable

Cycle Invoice Group Number

A new option has been added to the SedonaOffice application which now provides more flexibility in determining which recurring lines will be included in a Cycle Invoice Batch. This new option, *Invoice Group Number*, is set at the Recurring Line level. When creating a new Cycle Invoicing Batch, in addition to the Month/Year, you may select which Invoice Group Number will be billed. If no Invoice Group Number is selected on the Cycle Invoicing form, all eligible recurring lines in the Invoice Group Number of 0 (zero) will be selected for billing.

Your company may assign up to nine unique Invoice Group Numbers labeled 1 through 9. Any recurring line that is not assigned to an Invoice Group will default to the group of zero.

This new Cycle Invoice Group Numbering option is available for regular customers and for subaccounts that bill to master accounts.

When updating to SedonaOffice version 5.6.164, all recurring lines which have not been assigned an Invoice Group Number will automatically be set to 0 (zero).

Possible Uses

- Group Recurring by Billing Cycle i.e. monthly, quarterly, semi-annually and annually
- Group Recurring for specific customers
- Group Recurring for customers who are billed in arrears
- Group Recurring for the purpose of smoothing out monthly cash flow



Application Enhancements/Improvements (continued)

Recurring Line – Invoice Group Number Field

New Recurring			
Ω	Desire Waldroup 51 Hartford Turnpike Novi, MI 48375	Waldroup, Desire 51 Hartford Turnpike Novi, MI 48375	
System	7157 Intrusion		
Panel Type	UNKNOWN		
Recurring Setup	Royalties/Commissions Changes		
Recurring <u>I</u> tem	MON	Renewal	
Description	Monitoring	Rate Increase	
Sub Item Of		Override %	_
<u>B</u> ill Cycle	Monthly	PO Number	
		PO Expires	
RMR Amount	28.00	Reference	
Cycle Amount	28.00 Enter as	mt	
cycjo Hindanc	Only	Comments	<u> </u>
Next Cycle Date	01-Dec-12		
Reason for Add		Memo	
Recurring Start	Via k Jacka	as	-
	Deradit		
(Invoice Group #			
		Save	lose

Cycle Invoicing – Invoice Group Number Field Selection

🧟 New Cyc	le Invoicing			×
🧐 Cycle	Bill			
	Month Invoice (Descripti Include Custome with Bill D	on 01-Dec-12-Group 1		
Include V V	Branch MI OH	Description Michigan Ohio	Last Cycle 1/1/1900 1/1/1/2012	Posted Y Y
			<u>ا</u> ت	All Branches
			<u>Save</u>	lose

Application Enhancements/Improvements (continued)

Client Management

Equipment Move

The SedonaOffice application now provides the functionality to move Equipment from one System record to another System record on the same Site or to a System on different Site within the same Customer account. Equipment moves are accomplished by using the drag and drop method.

To move a piece of equipment, first expand the customer tree down to the System level on the System of where the equipment is currently located and on the System of where the equipment will be moved.

Highlight the Equipment tree option within the System of where the equipment is currently located. In the Active Pane, click on the Equipment Line to be moved; hold down the left mouse button and drag to the Equipment tree option of where the Equipment's new location.

The move icon will be displayed when you begin dragging the piece of equipment. Once

your mouse is positioned on the new Equipment location, a checkmark \checkmark icon will be displayed indicating this is a valid position on the customer tree to place the equipment. Release the mouse button; a message box will be display to confirm this is what you want to do.

🛅 Bill To	 Elite Karate 		Balance Due:
🖻 💷 Elite Karate	40 Main St.		Last Statement Date
Contacts	Canton, MI 4818	00	Total Active RMR :
🛅 Sites		>0	Total Active RAR :
🔄 🛅 (1) Elite Karate	(734) 569-0545		Customer Type:
🗄 🛅 Systems			Customer Since:
- V41250 Instrusion System			
Documents			Salesperson:
Equipment			Last Payment Rec'd
Equipment History		[- · · ·	
	Part	Description	Install Date
Inspectants Inspectants Inspectants	BOSWZ15K3VA4R	WIZ KID BULLET CAMERA	12/5/2012
	BOSWZ15K3VA4R	WIZ KID BULLET CAMERA	12/5/2012
Recurring History	BOSWZ20NXV550 BOSWZ20NXV550	IR DAY/NIGHT BULLET CAMERA IR DAY/NIGHT BULLET CAMERA	12/5/2012
Recurring Master Items	BOSWZ20NXV550	IR DAY/NIGHT BULLET CAMERA	12/5/2012
Service	HID3100340	HU3100340 MAGNETIC STRIPE READER	12/5/2012
	UHOHBG510	UHO SERIES OUTDOOR CAMERA HOUSING	12/5/2012
🖻 🧰 ссту ссту	UHOHBG510	UHO SERIES OUTDOOR CAMERA HOUSING	12/5/2012
E Central Station Tracking	UHOHBG510	UHO SERIES OUTDOOR CAMERA HOUSING	12/5/2012
	UHOHBG510	UHO SERIES OUTDOOR CAMERA HOUSING	12/5/2012
- 🖓 Equipment	HID4045CGNUO	ENTRY PROX STAND ALONE KEYPAD READER	12/5/2012
	HIDCQHIDC1325	CQHIDC1325 KEYSCAN CARDS 50 PACK	12/5/2012
	LTC922300	INDOOR/OUTDOOR COLUMN CAMERA MOUNT	12/5/2012
🕀 🛅 Notes	LTC922300	INDOOR/OUTDOOR COLUMN CAMERA MOUNT	12/5/2012
- 🤹 Recurring	LTC922300	INDOOR/OUTDOOR COLUMN CAMERA MOUNT	12/5/2012
- 🗟 Recurring History	LTC922300	INDOOR/OUTDOOR COLUMN CAMERA MOUNT	12/5/2012
- 🗟 Recurring Master Items		-	
January Service		/	
- Access Access Control			
E Central Station Tracking			
Documents			
Equipment V			
Equipment History			
i ⊡ Notes			
- 🕵 Recurring			
- 📴 Recurring History			
Recurring Master Items			



Application Corrections

Main Application

Opening Multiple Companies

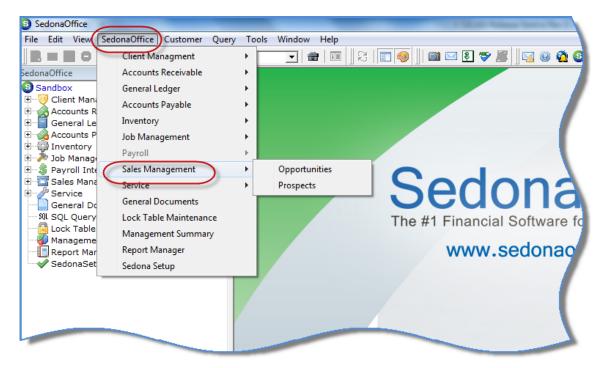
Reported issue: when two companies were selected to be open, only one Company tree could be displayed at one time. This issue has been corrected.





Drop Down Menu Navigation

Reported issue: when navigating to the application from the drop down menu, when selecting the Sales Management module, the menu option of *Technician Absence* was listed. This issue has been corrected.





Accounts Receivable

Statements (Bulk)

Reported issue: Statements were pulling wording for 30-60-90 day messages from the Statement Setup table instead of what is displayed/entered on the statement processing form. This issue has been corrected.

Statements – Bridgestone Export

Reported issue: Statement messages were not being included in the BFIS export file. This issue has been corrected.

File Edit View SedonaOffice Customer Query Tools Window Help SedonaOffice Sandbox Ciclent Management Ciclent Ciclen
Sandbox *** Cleant Management *** Cleant Management *** Cleant Management *** Cleant Management **** Cleant Management ***** Cleant Management ************************************
Statements Statement Statement
Client Management Cycle Invoicing Finance Charge Gustomers who have not received a statement so fi 12/5/2012 Customers who have not received a statement so fi 12/5/2012 Customers who have not received a statement so fi 12/5/2012 Make Deposit Gustomers who have not received a statement so fi 12/5/2012 Customers who have not received a statement so fi 12/5/2012 Cost Statements Gustomers Filter for Emailing Fint Options Date of Statement Statement Due Date Statement Due Date Statement Due Date Statement Summary Report Manager SedonaSetup TO 30 DAYS This is a finedry reminder that your account is past due. 3170 60 DAYS Your account is past due. Your account is past due. Stower out out is past due. Our account is past due. Our account is past due. Date of summary Report Manager SedonaSetup TO 30 DAYS This is
Minimum Days Past Due 30 Minimum Invoice Balance \$ 1.00 As of 12/5/2012 III Minimum Charge \$ \$5.00
Gose



Accounts Receivable (Continued)

Invoice/Statements – Bridgestone Export

Reported issue: Late Fees were not being calculated when using the Bridgestone Invoice/Statement export. This issue has been corrected.



Client Management

Collections

Reported issue: when working in a Collection queue and selecting to add a Manual Event for any customer that does not currently have a follow-up date, the date of 12/31/2199 was automatically populating the follow-up date field. This issue has been corrected.

S Over 45 Da	ys Past Due - Auto Sequ		Fees in Amount Due Amount Due: \$69,358.95
European Aut 9 Duncan Stra Detroit, MI 4 (313) 521-11	eet 8201	and a	S Enter Manual Collection Activity
Last Late Fee	: \$3,048.55		33446 European Auto Body 9 Duncan Street Detroit, MI 48201
Customer # 38137 33446	Name Wilkins, Mary European Auto Body	Phone (734) 888-21 (313) 521-11	
			Eollow Up Date
			Collection Status 2nd Coll Call
			Notes
			Save Close



Client Management (Continued)

Customer Query Builder (CQB)

Reported issue: field selections of Primary Transmission Format, Secondary Transmission Format were displaying the data for the opposite field. The Duress Password field was causing errors when selected due to a programming error. These issues have been corrected.

Company Rate Change

Reported issue: when a minimum RMR amount was entered for a Flat Rate type of increase, the customer list would display customers who have recurring amounts that are less than the minimum specified. This issue has been corrected.

S Company Rate Change	💿 Company Ra	te Change				×
Description Flat Rate OH 12-2012	Descriptio <u>n</u>	Flat Rate OH 12-2012]	 Standar Master Both 	d Customers Accounts
Setup Information Branches I Items Import List Notes Customers Post Rate Change	Setup Inform	ation Branches I Items I Import Lis	t Notes Custome	Post Rat	e Change	1
	Customer #		Item	Current	Incre	New
Effective Date 01-Dec-12 Setup	21727	Capital Region Education Council	MON	20.00	3.00	23.00
Secup Use Item Codes Increase By: RMR Amount						
(Use Item Codes Increase by: (RMIR Amount						
-OR- Elat Amount O Decrease Fixed Amount Amount to Amount						
C Decrease Fixed Amount 43.00						
C Use Recurring Renewal Dates						
Effective Date is Renewal Date						
AND Recurring Rate Increase Date is equal to the Effective Date, Increase by %						
Update Rate Increase Date by months						
Next Cycle Date						
Next Cycle Date 12/1/2012						
Text Cycle Date 12/1/2012						
Customer Types C Both						
C Commercial RMR Minimum \$19.96						
RMR Maximum \$20.96						
S Exclude Recurring Items		Total In	crease : \$3.00		Get	Customers
which have been rate increased within the last 365 days.						
which have a contract start date within the last						



Inventory

Serialized Parts – Repair Orders

Reported issue: a Repair Order was not displaying in the Warehouse Explorer, the Part Explorer, and was not being displayed in the Part Journal. This issue has been corrected.

PS295 Warehouses Main-MI MI-Cust Repair Inactive Warehouses Alternate Parts Bills Direct Expense PO Purchase Credits Purchase Price Variances Journal Price History Receipts Repair Order Returns	Part Code: Description: Detail: Costing Method: Product Line: Manuf Part Code UPC: Special Order: Sales Descriptio Sales Price: Service Price 1: Service Price 1: Service Price 2: Total Qty: Total Value:	CCTV Equipment N/A :: N n: Bullet Camera \$500.00	amera	Warehouse Branch Account Minimum Qty Maximum Qty Maximum Qty Committed Qty On Hand New On Order Qty Out For Repair Value On Hand Row Shelf Bin Inactive	Main-MI MI 120000 0 0 0 0 0 \$0.00
🖃 Sales Credits 💦 🔪	Repair Number	Warehouse	Statu	ıs Order Date	Due Date
Sales Invoice Service Serial Numbers Transfer Vendors Documents GTIN	RMA36922	MI-Cust Repair	Close	d 12/3/2012	

Receiving Purchase Orders

Reported issue: If the only purchase orders open for a particular Vendor were marked as direct expense, when attempting to receive from Inventory/Receive Parts, the list of open purchase orders would not display. This issue has been corrected.



Job Management

Install Charges – Pass Thru Items

Reported issue: Install Charges that were added to a Job by selecting an Invoice Item on an A/P Bill Expense Item (Pass Thru Item) could not be invoiced during Job Billing. This has been corrected by auto-filling the default Job Type Job Phase Code for these types of Install Charges.

Job Invoicing List

Reported issue: on the list of Job Ready to Invoice, the Total Open Install [amount] was being displayed as zero and the Total Open RMR [amount] was being displayed as what should be the Total Open Install amount. This issue has been corrected.

Job #	Phase	Customer #	Site Name	Address	City	Bill Type	Status	Open Install	Open RMR	Adv Dep
.29	Phase 01	13353	Chagrin Falls Memorial Hosp	71 Haynes Street	Chagrin Falls	Partial	Prewire	123060.00	661.67	58014.00
.29 .37	Phase 01	3293	Cardinal Hill Apts	265 Kensington Av	Lansing	Partial	Scheduling	121352.00	239.00	65000.00
42	Phase 01	106	Fischer, James	123455 Mason	Plymouth	Partial	Scheduling	0.00	45.00	325.00
154	These of	10663	John Hayes & Sons	30 Potuccos Ring R	Plymouth	Full	Job Complete	0.00	10.26	17.50
164	Phase 01	11259	Engineering Consultants-Parts&Smarts	941 Wethersfield A	Detroit	Partial	Jobcost	16779.20	0.00	0.00
164	Phase 01	11259	Engineering Consultants-Parts&Smarts	941 Wethersfield A	Detroit	Partial	Jobcost	16779.20	0.00	0.00



SedonaService

Inactivated Problem Codes

Reported issue: if a Problem Code was marked as Inactive in SedonaSetup and any tickets using this problem code were still open, a User was unable to close those Service Tickets. This issue has been corrected.

SedonaSchedule – Multi-day

Reported issue: When selecting to display the Schedule for a date in current month and the first day of the next month, the appointments that were scheduled in the current month were not being displayed. This issue has been corrected.

Image: SedonaService-SedonaSecurity 5.6.0.162 _ m × Vew Service Options										
	Ma 🔍 Ins	spection Creation	MI Techs 👻	@ 👽 🕕 w	arning Count = 43	Tickets List 🔹 [Show Unassigned	O	Open Custome	r
	🥂 🍪 Re	moved Parts	Display Group Technic	ians 🔻 Warni	ng List 🔹		Group Day Within	Owner 💿 🙋	Ticket	66
Show/Hide Today Day Week Month Queue Calendar Bar	Tickets 😟 Mi	iscellaneous Appointments	Override Display	Group Ticket	s On Site		loom 🔘 🥥	• 🎤		
Navigation	Arrangement		DisplayGroup		SedonaMonito		Calendar O		Tools	
🗷 Calendar 💦 🔪	(28)		Friday			01		Monday		*
September 2012 Cotober 2012	TUnas	signed] Mark Taylor	Marlin Larson	Marshall Watson	Mike McKenzie	[Unassigned]	Mark Taylor	Marlin Larson	Marshall Watson	Mike McKenzie
1 1 2 3 4 5 6										
2 3 4 5 6 7 8 7 8 9 10 11 12 13 91011 12 13 14 15 14 15 16 17 18 19 20	1:00									
16 17 18 19 28 21 22 21 22 23 24 25 26 27	2:00									
23 24 25 26 27 28 29 28 29 30 31 30	3:00									
	4:00									
0	5:00									
Site	7:00									
	8:00	TKT 2474 -	TKT 2477 -							
System	9:00	AC Power Failure	Add							
Contact	10:00	(Medium)	C&J						TKT 2478 -	TKT 2479 -
	11:00	Jay Smith - 11	(cus						Add Equipment	Add Equipment
Problem	12 pm								(Medium)	Candace Mann
Technician 🗾	1:00								Franklin Miles -	
Scheduled 🗾	2:00								·/	
Dispatched 🚽 🗄 🗐	3:00									
Arrived 🚽 🗮 🗉	4:00									
Departed	5:00									
,	6:00									
New Appt	7:00									
Last Refresh: 12/6/2012 9:05:07 AM	8:00									
Notes Map Email	9:00									
	10:00									
🔛 Unscheduled (0) 🕕 Detail	11:00									
灯 Start 📔 🚋 🏉 🛛 🗿 Sedona Office	🥜 Sedon	aService - Sedo] EN	<u>₽</u> ⊕@ , 3 6