

SedonaOffice Release Notice

SedonaOffice

Version 5.6.173

Last Updated: 29-March-2013

SedonaOffice

549 East Washington Avenue Chagrin Falls, OH 44022 45185 Joy Road Canton, MI 48187

440.247.5602

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 5.6.168. This is an intermediate version update that contains new features and application corrections.



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Application Enhancements/Improvements

Accounts Receivable

Invoice Printing

A new option has been added to the Printing Preferences Format form labeled "Show Invoice Subtotal". If this option is checked, Invoices will print subtotals of the items sold. If unchecked, subtotals will not be printed on the invoice.

Please refer to the Invoice Form listing found on page 5 for a listing of which forms are supported by this new printing option.

Note: When your company updates to version 5.6.172, this option is automatically "unchecked" by default; which means subtotals will <u>not</u> print. If your company has always printed subtotals and desires to continue doing so, then you must check this box before printing invoices.

Printing Preferences
Form: Bridgestone Standard
Printer: \\INSPIRON2500RE\HP LaserJet 5
Paper Eormat Item Detail Statement Detail Late Fees
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
✓ Only print remittance coupon on first page
Do not show this again OK Cancel

SedonaOffice® The #1 Financial Software for Security Companies

Version 5.6.173 Release Notice

	Additional	Print Invoice		Additional	Print Invoice
Form Name	Name	Subtotals	Form Name	Name	Subtotals
	Prints	Supported		Prints	Supported
2 x 2 a (8.5 x 14 landscape)	N	N	Custom Form (CS09)	Y	N
Alternate Form 1	N	N	Custom Form (CS10)	Y	N
Alternate Form 2	N	N	Custom Form (CS11)	Y	N
Alternate Form 3	N	N	Custom Form (CS12)	Y	N
Alternate Form 4 (A4)	N	N	Custom Form (CS17)	Y	N
Alternate Form 5	N	N	Custom Form (CS18)	Y	N
Alternate Form 6 (Custom)	N	N	Custom Form (CS20)	Y	N
Alternate Form 7	N	N	Custom Form (CS21)	Y	N
Alternate Form 8	N	N	Custom Form (CS22)	Y	N
Bridgestone Standard	Y	Y	Custom Form (CS23)	Y	Y
Custom Form (CM01)	Y	N	Custom Form (CS24)	Y	Y
Custom Form (CM02)	Y	N	Custom Form (CS25)	Y	Y
Custom Form (CM03)	Y	N	Custom Form (CS26)	Y	N
Custom Form (CM06 SL)	Y	N	Custom Form (CS27)	N	N
Custom Form (CM06)	Y	N	Custom Form (CS28)	Y	N
Custom Form (CM07)	Y	N	Custom Form (CS30)	Y	N
Custom Form (CM08)	Y	N	Custom Form (CS31)	Y	N
Custom Form (CM11)	Y	N	Custom Form (CS32)	Y	N
Custom Form (CM13)	Y	N	Custom Form (CS33)	Y	N
Custom Form (CM14)	Y	N	Custom Form 1	N	N
Custom Form (CM15)	Y	N	Custom Form 10	N	N
Custom Form (CM16)	Y	N	Custom Form 2	N	N
Custom Form (CM17)	Y	N	Custom Form 3	N	N
Custom Form (CM18)	Y	N	Custom Form 4	N	N
Custom Form (CM19)	Y	N	Custom Form 5 (Master)	N	N
Custom Form (CM21)	Y	N	Custom Form 6 (Dealers)	N	N
Custom Form (CM22)	Y	N	Custom Form 7 (Service)	N	N
Custom Form (CM23)	Y	N	Custom Form 8	N	N
Custom Form (CM25)	Y	Y	Custom Form 9	N	N
Custom Form (CM26)	Y	N	Custom Master Form 7	N	N
Custom Form (CM28)	Y	N	Custom Master Form 8	N	N
Custom Form (CS01)	Y	N	Cycle System - Sys Acct	Y	Y
Custom Form (CS02)	Y	N	Cycle System - Sys Desc	Y	Y
Custom Form (CS03)	Y	N	Dealer Invoice #1	N	N
Custom Form (CS04)	Y	N	Dealer Invoice #2	N	N
Custom Form (CS05)	Y	N	Dealer Invoice #3	N	N
Custom Form (CS06 SL)	Y	N	Invoice Statement	Y	Y
Custom Form (CS06)	Y	N	Jobs Invoice w/Equipment	Y	Y
Custom Form (CS07)	Y	N	Master Accounts	N	N
Custom Form (CS08)	Y	N	Service Invoice	N	N
			Standard Form	Y	Y
			Standard w/Payments	Y	Y
			Terms Form	Y	Y



Statements

Barcode in Bridgestone Export File

A new option has been added to the Bridgestone Statement Export Profile to include the option to print a barcode on customer statements. This option is located on the General tab of the Export Profile form. This option is only supported on the Standard Statement form.

Export Profile		x
General FTP Up	load Files Backup	
Export Format:	Bridgestone CSV Format	
Company ID:	sedonatest	
Scanline Style:	Standard 💌	
Scanline Prefix:	1123456	
Export Location:		
C:\Program Files\P	erennial Software\Sedona Office\BFIS Browse	
✓ Print Barcode		
<u></u>	OK Cancel Apply	



Barcode on Statements

SedonaSecurity 417 Forest Plymouth, MI 48170	Statement
(734) 414-0760	Date Customer Number 3/1/2013 13524
	Amount Due 1,443.90
To: Gino Johnson 12 Belmont Road Kingston 5 Kingston	Remit To: SedonaSecurity 417 Forest Plymouth, MI 48170
Jamaica West Indies	S Printing Preferences
Amount Enclosed:	Form: Standard Form (S0 1) Printer: \\INSPIRON2500RE\HP LaserJet 5
Customer Name	Paper Eormat
Gino Johnson	O Plain Paper
Date Invoice Number PC Fino Johnson, 16 Johns Path Novi, M. 2/21/2013 72669 2/21/2013 72672 2/22/2013 2/22/2013 72676 2/24/2013 2/25/2013 72793 2/25/2013 2/25/2013 73178 Fino Johnson, 2252 Langley Lane Notes	Scale: Inches Adjust Top: 0.0000 Adjust Left: 0.0000 Adjust Bottom: 0.0000 Letterhead Style: Text Image: Image:
2/25/2013 72797	Background Shading: (None) ▼ ✓ Print Form Text (labels) ✓ Print Borders and Lines ✓ Print Barcode
	OK Cancel



Accounts Payable

User Defined Purchase Order Message

A new option labeled "Special Message on PO Print" has been added to the Accounts Payable Setup Processing form. Any information entered into this field will print on ALL Purchase Orders. This new field will accommodate up to 1,024 characters.

Sedona Office Setup (Sedona Security	1)					
File Find Find Next View Tools Help						
Sedona Setup			AP Setup Processing			
	1 1	_	An accup Processing			
Description						
Sedona Modules	OP		Setup Dther			
Custom Fields Setup (Vendor)	AP					
Custom Fields Table1 (Vendor)	AP		🔜 Purchase Order Setup			
Custom Fields Table2 (Vendor)	AP		Auto Create PO Numbers 🔽			
Custom Fields Table3 (Vendor)	AP	Ξ				
GL Account Defaults	AP		Next PO Number 1162			
Setup Processing	AP		Direct Expense All Jobs & Tickets			
Shipping Methods	AP		-			
Tax Agency	AP		PPV All Standard Cost Adjustments 🔽			
Terms	AP		Special Message on PO Print			
Vendor Types	AP		This field holds text that will print on ALL purchase orders. The maximum number of allowable characters is 1024. This			
Vendors	AP		message will print in addition to any Vendor PO Messages.			
Aging Buckets	AR					
Alternate Company Addresses	AR					
Banks	AR					
Check 21 Setup	AR					
Credit Reason	AR		📇 Check Options			
EFT Credit Card Types	AR		Allow Printed and Voided Checks			
EFT Setup	AR		to be edited.			
GL Account Defaults	AR					
Invoice Descriptions	AR		Show Account Balance			
Invoice Items	AR					
Item Types	AR		📙 🗖 GST Information			
Late Fee Rules	AR					
Setup Processing	AR		GST <u>N</u> umber			
Statement Rules	AR		CCT Data			
Tax Groups	AR		GST <u>R</u> ate			
Tax Tables	AR		GST Pay Account			
Terms	AR					
Cancellation Profiles	CM					
Cancellation Tasks	CM					
Chain Accounts	CM					
Collection Statuses	CM					
Custom Fields Setup(Customer)	CM					
Custom Fields Setup(Site)	CM		Apply			
Custom Fields Setup(System)	CM	-				
			-			



Purchase Order with User Defined Message

				[
SedonaSe 417 Forest Plymouth, MI 481	-			Purch	hase O	rder
(734) 414-0760				PO Numb 1126	-	Date /26/2012
				Warehous	ie i	Fotal Cost 259.86
	arity Systems Inc Isury Center L 60690			417 Forest Plymouth, MI	48170	
Telephone: Fax: (585)	: (888) 289-0096 223-9180					
Order Date	Category	Shipping Date	Ship V	ia	Shipping #	Due Date
12/26/2012	S-Svc T&M					
Part/Expense DSCBV300 DSCLCD4501		iption 70 300 MOTION LCDKE YPAD		Quantity 6 2	Unit Cost 13.4400 89.6100	T otal Cost 80.64 179.22
				Purch	ser Defined hase Order essage	
here family. She t her family who pro serve me a huge h burned my tongue Shortly thereafter,	oiled over the stove for hou empthy came downstairs to s telping. So mama bear did a , said papa bear. I think we , a little girl by the name of G	ama, a papa and a baby bear, ars producing the most wonde ee what was causing the won skrequested. Papa bear atten should all go for a walk in the oldflocks happened upon the thoone answeredher. So, be	ful porridge. The sme denful aroma. Papa bea pted to take one bite a woods while our porr home of the three beas	Il of the wonderful po ar said to mama bear, o nd found the porridge idge cools off. So the	rridge filled the house of the honey that smells s to be much to hot to e family set out into the	and woke up o good, please ach. Ouch, fhat woods.
Job	# 143				T otal Cost	259.86
Vendor form wh mode. Other tab at a Vendor in E Payments, PO's, J	lemo field that is loc en working with a V is are also exposed v dit mode; such as: B Receipts, Returns, G	endor in Edit when looking ills, Credits,	norized By: ature			
GL Accounts,			ne & Title			1



Purchase Orders – Print Barcode

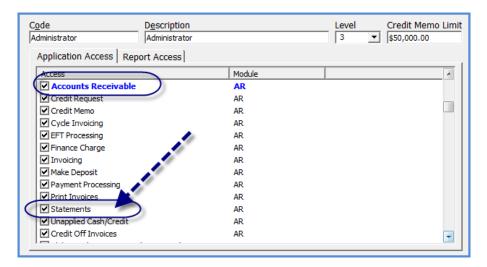
A new option labeled "Print Barcode" has been added to the Purchase Order Printing Preferences form. This new option has been added in preparation for the new Barcoding Module.

S Printing Preferences
Form: Standard Form
Printer: \\INSPIRON2500RE\HP LaserJet 5
Paper Eormat
Plain Paper
C Pre-printed Form (Form Alignment)
Scale: Adjust Top: 0.0000
Adjust Left: 0.0000 Adjust Bottom: 0.0000
Letterhead Style: Text
Image:
Background Shading: (None)
✓ Print Form Text (labels) ✓ Print Borders and Lines
Print Barcode
Do not show this again OK Cancel

Client Management

Remove Late Fees Option

A new option has been added which allows a User to remove the current late fees on a customer. This new function is performed from a Customer Explorer record. Users must have permissions for Statements to be able to use this new function.



To remove a Customer's Late Fees, open the Customer Explorer, highlight the Last Late Fee shown in the Financial Summary area [upper right pane], right-click and select the option *Remove Late Fee*. A message will be displayed confirming the removal of the Late Fee.

S 24074 Fisher, Katherine ** 1st Coll Call **						
Fisher, Katherine Customer Information General Payment Options Beneral Bill To Sites Activity Ledger Activity Ledger Activity Ledger	Fisher, Kather 212 Kates Pa Canton, MI 4 (734) 362-555	ath 18188	Last Last * 1 Tota	nce Due: Statement Date: Late Fee: st Coll all * ave RMR : al Active RAR :	Over \$24.95 \$299.40	Late Fee
Collections Contacts Credit Memos Deferred Income (Unposted) Documents EFT History Inner Office Message		Last Late Fe	e Cust Sale Last **	tomer Type: tomer Since: :sperson: : Payment Rec'd: EFT Pending ** bunt:	Residential 12/30/2009 Matt Miller \$26.57 (06/28/ \$106.28	12)
Inner Office Message Invoices Jobs Journal Detail Journal Summary Notes Payments Prospects	Bill Contacts Title Owner Open Invoices Invoice #			the late fee from this cust	omer record?	Net Due
Recurring Recurring Refunds	48143 60401 74598	Kath Kathe nne naner Katherine Fisher	Recurring	2/25/2012	\$132.86	\$53.14 \$53.14 \$132.86
	Open Credits	\$25.00				



Additional Name Field

A new field, "Additional Name", has been added to provide extra space for customer names which are too long to fit into the existing BillTo name field. This new field will hold up to 60 characters of information. This new field will print on many of the existing printing forms. Please refer to the chart on page 5 for a listing of which invoice forms support this new field.

Customer Bill	ing 10024		×
Customer Informa	ation		
🤨 Customer #	10024		
Customer Na	me Hoffman Auto Group		
Billing Inform	nation 🔤 Contacts		
	Residential C Commer	∏ Inacti ☑ Prima dal ⊙	
Name			
	Hoffman Auto Group Inc.		
<u>A</u> dditional Name	Subsidiary of ACON Internation	al LTD / Williamsburg Ind L	
<u>A</u> ddress	650 Connecticut Blvd Canton, MI 48188		
Phone <u>1</u> Phone <u>2</u>	(734) 260-6112		
<u>F</u> ax			
Email	gmiller@hoffmanautogroup.cor		
	Email Invoices	Email Invoices Available thro PDF Explode Only	bugh
	Copy Billing Address to Site		
		Save	<u>C</u> lose



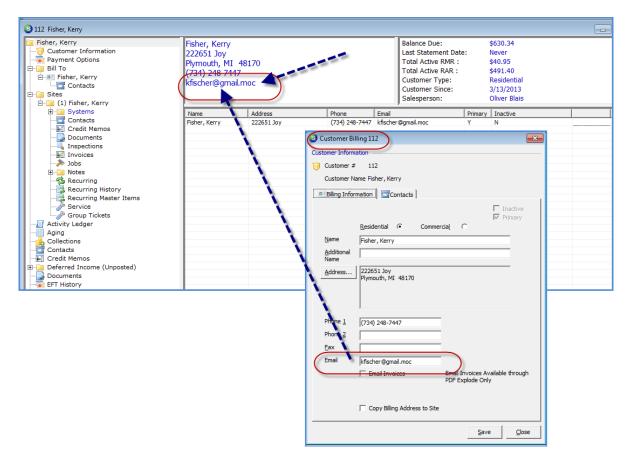
The "Additional Name" field is also located on the *Customer Setup* form and the *Site Setup* form. These fields will hold up to 60 characters of information. Currently, any information entered into these fields is for information purposes only and does not print on any invoices, statements or reports.

(5) 10	024-2 (25224)	700 Connecticu	t Blvd Canton MI			×	Ĵ		
🥡 (650 Connecticut Blvd								
Ν	Name Hoffman Auto Group Canton, MI 48188								
Site	Site Justom Fields Systems Jobs Contacts Invoices Service Tickets Items								
Sit	e Name and Ad			Site Information					
		C <u>R</u> esidential	Commercial	Branch	MI				
	Site Number	25224		Cross Street	8036				
	Site <u>N</u> ame Add'l <u>N</u> ame	Hoffman Auto G	Group	<u>M</u> ap Code C <u>u</u> stomer Since	25224				
		700 Connecticu	t Plud	C/S Linking	2/26/2004				
_	<u>A</u> ddress	Canton, MI 48	188		1				
				Tax Information					
	Phone <u>1</u>	(734) 260-611		Tax <u>G</u> roup	MI-Wayne Coun	ty 🔻			
	Phone 2		Customer Setup	No. of Concession, name					
	<u>F</u> ax	<u> </u>		10024	-	Hoffman Auto 650 Connectio		*	
		Copy Site A		loffman Auto Group		Canton, MI 48	3188	_	
				Subsidiary of ACON Inte		, , , , , , , , , , , , , , , , , , ,			
Co	omments		Setup Information Ci	ustom Fields Bill To	Master Account Se	etup Items		1	
	19631		C <u>u</u> stomer Status	ANR	📕 Bla	nket <u>P</u> .O.			
			Customer Type	Commercial	▼ P.C). Expire Date			
			Old Customer <u>I</u> D		Cu	stomer Since	2/26/2004		
	active		Terms	Due On Receipt	▼ Ch	ain Account		•	
			Tax <u>E</u> xempt #		Cu	stomer <u>G</u> roup	MI	•	
			OK to Increase		Cu	stomer Group 2		·	
			Salesperson	George.Miller		inch	MI	•	
			Commission Pctg	5.00	No	Collections			
			Master Account Infor			e Printing			
			Account Index	Is Master Account		Print Cycle Invoi Print Statements			
			Account Index	18 (FOI AUTO NU	V	Print Site Info or	n Invoices Invoice for Each Site		
				Sub Account Invo		Charge Late Fee			
			Critical Message ——	Master A/R					
			Expires On		1				
							<u>S</u> ave	<u>C</u> lose	



Email Address Display

If an email address exists on the Primary Bill To record, this email address is now displayed in the Primary Billing Information pane of the Customer Explorer.





Jamaican Address Formatting

SedonaOffice now supports address formatting for the country of Jamaica.

S Customer Billin	g 13524	8
Customer Informatio	nc	
🧿 Customer #	13524	
Customer Name	e Johnson, Gino	
Billing Information	tion Tornacts	
R	□ Inac ☑ Prima esidential ⓒ Commercial ◯	
	lohnson, Gino	
Additional Name		
Address	S Edit Address	×
	Country Jamaica	_
L	Line <u>1</u> 12 Belmont Road	
Phone <u>1</u>	Line 2 Kingston 5	
Phone 2	Line <u>3</u>	
<u>E</u> ax	Parish Kingston	- +
Email		
L. L.		
г		
	Save	e <u>C</u> lose



Cancellation Queue Enhancement

A new checkbox labeled "All Tasks Complete" has been added to the Customer Cancellation Queue. When this checkbox is selected, only Cancellation records where all Cancel Tasks have been checked as complete will be displayed in the Cancellation Queue.

otal in Queu	e 2		Tota Contract E	l RMR Jalance	\$24. \$0.					
Customer #	Name	Reason	Effective Date	Follow Up	Reduce RMR	Sites	Contract F	ull Reference	C/S Cancel	C/S Cancel Date
1588	Jackson, Elisabeth	Bankrupt	2/23/2013	2/21/2013	0.00	1	0.00 Y		N	
1457	Mcgee, Alice	Deceased	3/1/2013	3/1/2013	24.95	1	0.00 Y	CS65165	Y	3/1/2013
			1							

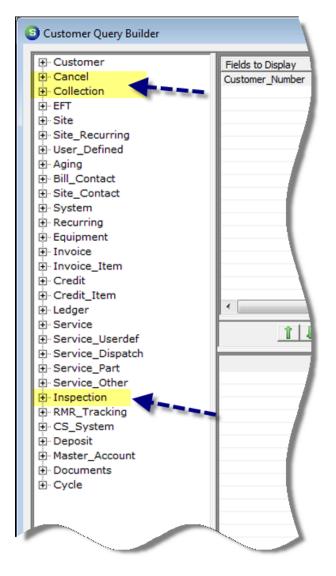


Customer Query Builder (CQB)

Three new Data Groups have been added to the Customer Query Builder: Cancel, Collection and Inspection. The fields contained in the Cancel and Collection groups were previously located in the Customer Data Group. The fields contained in the Inspection data group previously were located in the System group.

New fields were added relevant to the new Cancel group; these were not previously available when the cancel fields resided within the Customer data group. New data fields for all areas of the CQB are listed on the next page.

These new groups were created to make it easier to locate fields specific to the three topics.





Customer Query Builder (CQB) - New Data Fields

Several new data fields have been added to the Customer Query Builder; these fields are listed below the heading of the associated Data Group in which they reside.

Data Group

Field Name

Cancel

Cancel_Reference Cancel_CS Cancel_CS_Date Cancel_Balance_of_Contract (amount) Cancel_All_Tasks_Complete

S Customer Query Builder	
Cancel_Profile	
Cancel_Profile_Description	
Cancel_Queue_Status	
Cancel_Queue_Effective_Date	
Cancel_Queue_Follow_Up_Date	
Cancel_Queue_Notice_Date	
Cancel_Queue_Entered_Date	
Cancel_Queue_Entered_By	
Cancel_Queue_Full_Cancel	
Cancel_Task	
Cancel_Task_Description	
Cancel_Task_Completed	
Cancel_Task_Completed_Date	
Cancel_Reference	-
- Cancel_CS	=
Cancel_CS_Date	
Cancel_Bal_of_Cont	
Cancel_All_Tasks_Compl	
Cancel_Queue_RMR	
Cancel_Queue_RMR_Reason	
Cancel_Queue_RMR_Reason_Desc	
E Collection	
FT EFT	



Customer Query Builder (CQB) – New Data Fields (continued)

<u>Data Group</u>

Field Name

Equipment

Lot_Number Quantity Removal_Job_Service_Other Removal_Date

S Customer Query Builder	
⊡ Customer ▲	T
	1
. Collection	L
Ė EFT	L
. Site	L
E Site_Recurring	L
⊕ User_Defined	L
tin Aging	
⊕ Bill_Contact	L
E Site_Contact	L
. Evistem	L
Recurring	L
⊟- Equipment	L
Job_Service_Other	L
Part_Code	L
Part_Description	L
Quantity	L
Date	
- Location	L
Manufact_Warranty_Exp	L
Serial_Number	L
Lot_Number	L
Equipment_Warranty	
Equipment_Warranty_Start_Date	
Equipment_Covered_By_Contract	
Removal_Job_Service_Other	
The Invoice	



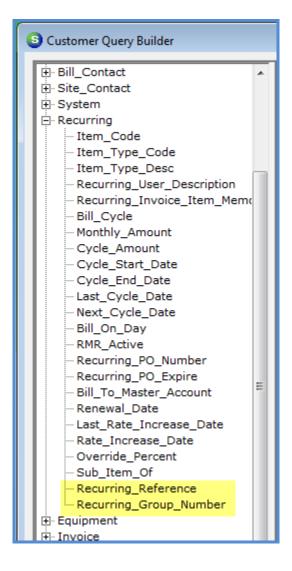
Customer Query Builder (CQB) - New Data Fields (continued)

Data Group

Field Name

Recurring

Reference Recurring_Group_Number





Customer Query Builder (CQB) – New Data Fields (continued)

Data Group

<u>Field Name</u>

System

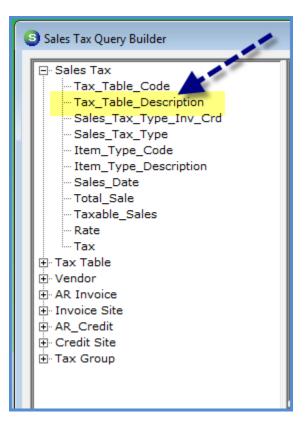
Require_PO System_Critical_Message System_Critical_Message_Expires System_Critical_Message_Created (Date/Time) System_Critical_Message_By (User)

S Customer Query Builder	
É. Aging ▲	T
⊡ System	
System Type	
Panel_Type	
Panel Location	
- Contract_Form	L
- Contract_Number	L
	L
Service_Level	L
Alarm_Account	
System_Memo	L
Service_Company	L
Alt_Service_Company_1	l
Alt_Service_Company_2	l
Contract_Start_Date	
Cycle_PO_Number	
Cycle_PO_Expire	l
Months	l
Renewal_Months	l
System_OK_To_Incr_Date	l
Warranty_Date	l
Inspection_Service_Level	l
System_Notes	l
System_Comments	
System_Route	
System_Route_Desc	l
Require_PO	
System_RMR	
System_Inactive	
System_Critical_Message	
System_Critical_Message_Expires	
System_Critical_Message_Created	
System_Critical_Message_Created_By	
E Recurring	
Equipment	



Sales Tax Query Builder

One new data field, Tax Table Description, has been added to the Sales Tax Query Builder. This field is located in the Sales Tax data group.



Job Management

Duplicate Job Tasks

An enhancement has been made to the Job Management module which provides the ability to reuse the same Job Task Code on a Job if the Job Task Code is assigned to a unique Phase Code.

S Job - 149 (Gind	_								
Job	Jo	b			Cu	stomer 3203	34		Site
Sales Summary	Job Job Job Syst	Number Type Status æm	R-Intrusion	on	Sc 6 (ott, Gino Drchard Dr nton, MI 48188			Gino Scott 6 Orchard Dr Canton, MI 48:
Work Order	Tas	ks							
	#	Phase		Task		Job Status	Invoice	8	Approved
	1	Prewire		Order Parts		Parts	N	N	
Job System	2	Prewire		Sch Install		Scheduling	N	N	
	3	Prewire		Install		Prewire	Y	N	
\mathcal{N}	4	Trim-Ou	-	Order Parts		Parts	N	N	
\sim	5	Trim-Ou		Sch Install		Scheduling	N	N	
Tasks	6	Trim-Ou	it	Install		Install Equipment	Y	N	
Installs \$0.00 Recurring \$0.00	7	Final		Jobcost		Jobcost	Ν	Ν	



SedonaService

City Name on Appointments

The display of information within a ticket appointment has been modified to show the site City Name in a bold font at the top of ticket information displayed.

<u>}+</u> =			_		SedonaS	ervice - Sedona Sec	urity 5.6.0.1	.66
View Servi	ce Options				(.	
\blacktriangleright 🍕			🥬 🔍 Inspection Creat	ion	MI Techs	- 😡 😼	_	ing Count = 21
Show/Hide Today	Day Week Month		Group			up Technicians 🔻	Warning Tickets	
Calendar Bar Navigation			Tickets 🧿 Miscellaneous A rangement	ppointments		le Display Group	lickets	SedonaMor
			25		- Disp	nay or oup	Ļ	Mon
Calendar February 2013	March 2013		[Unassigned]	Mack	Miller	Marlin Lars	on	Marshall
SMTWTFS	SMTWTFS							
12 3456789	1 2 3 4 5 6 7 8 9							
10 11 12 13 14 15 16 17 18 19 20 21 22 23	10 11 12 13 14 15 16 17 18 19 20 21 22 23	12 am						
24 25 26 27 28	24 25 26 27 28 29 30	1:00						
	31	2:00						
1		3:00						
Site		4:00						
		5:00						
System		6:00						
Contact		7:00						
		8:00						
Problem Technician		9:00		TKT 2247 - C	an't Set	TKT 2249 - AC Po	ower	TKT 2251 - A
		10:00				-		
Scheduled		11:00		TKT 2252 - C				
Dispatched		12 pm		B/A (Mediun Plymouth				
Arrived	•	1:00	_	Gino Wall @1	94 Setucket			
Departed		2:00)			
		3:00						
New Appt		4:00						
	Save Edit	5:00						
Notes	Map 🛛 🖾 Email							
		6:00						



Report Manager

Report Modifications

The following reports have been modified to allow for larger monitory values to fit on the report:

- A/P Aging Summary
- Cycle Invoicing Detail
- (A/R) Current Aging report



SedonaSetup

User Groups – New Permissions

A new Permission option has been added to SedonaSetup

• Edit Job Sold Date on Jobs – If this permission is granted, the User will be able edit the Job Sold Date [which is entered on the Job Work Order form] until the Job becomes locked.

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Application Corrections

Accounts Payable

Check Printing

Reported Issue: when batch printing checks, the address from the first check would be duplicated on all checks in the batch. This has been corrected.

Write Checks

Reported Issue: The address for the Vendor would default formatting to the long state/province name. This was changed to use the state/province abbreviation to match up with the process used in the Pay Bills area.

A/P Query Builder

Reported Issue: Users that did not have permission granted to work with Secure Vendors were able to see Secure Vendor information using the A/P Query Builder. This has been corrected.

Purchase Orders

Reported Issue: If a User accidentally typed in a non-numeric value to the Amount field of a part, the application would cause a Type Mismatch error and the application would close. This has been corrected.



Client Management

Customer Explorer - Documents

Reported Issue: When viewing Service Documents on the customer explorer, the application could pull in documents from a second company database if one existed. This problem has been corrected.

Reported Issue: multiple problems have been corrected in SedonaDocs where having multiple companies saving documents could cause conflicts and loss of linking of documents to the correct customer.

Customer Explorer – System Documents

Reported issue: An error message was being displayed when clicking on the Documents menu option within the System level of the customer tree. This has been corrected.



Inventory

Return to Stock

Reported issue: returning a standard cost part to a warehouse where the part did not exist was leaving the standard cost value to \$0.00. This was causing incorrect adjustments to job costing when returning parts to stock from jobs where standard cost parts did not exist in the warehouse.

Receiving Purchase Order for Parts

Reported Issue: Within the Part Receipt form, if a User accidentally typed in a nonnumeric value to the Amount field of a part, the application would cause a Type Mismatch error and the application would close. This has been corrected.



Job Management

Job System Comments

Reported Issue: When closing a Job the system comments from the Job would truncate and overwrite existing system comments if the Job was attached to an existing system for the customer. This has been corrected.

Job Invoicing

Reported Issue: If a User received a "Time Out" error when saving the invoice, and a second retry of the save goes through, the line items on the invoice would double up. This has been corrected.

Importing from QuoteWerks

Reported Issue: Imports would fail when importing a Quotewerks order where an item identified as HEADING ONLY and free text was entered in the description. This has been corrected.

SedonaService

- Reported Issue: when the Sagequest web service is unavailable or unreachable, the module would crash. SedonaService will continue to run if SageQuest becomes unavailable.
- Reported Issue: Users were unable to open service tickets from the schedule board under certain circumstances. This issue has been corrected.
- Reported Issue: A closed ticket could be dispatched through the Job Management system using the Appointment Summary. This has been corrected.
- Reported Issue: A .01 rounding error could occur when invoicing a service ticket where imprecise labor calculations would be necessary. This has been corrected.



Report Manager

Recurring Royalties Report

Reported issue: The Recurring Royalties report was displaying duplicate lines if customer had multiple Bill-to addresses. This issue has been corrected.



SedonaServer Utilities

Sandbox Wizard

Reported Issue: The Sandbox Wizard was creating duplicate sandboxes when the case didn't match existing sandbox name. This has been corrected.