

# SedonaOffice Release Notice

## SedonaOffice

Version 5.6.219

Last Updated: June 18, 2014

SedonaOffice

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## About this Document

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## Overview

This document is being provided to explain enhancements, changes and application corrections made to the SedonaOffice application since the last released Version 5.6.215.



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## **Application Enhancements/Improvements**

#### **Accounts Receivable**

#### EFT Processing with multiple Merchant ID's

New functionality has been incorporated into the EFT Processing effective with the release of SedonaOffice version 5.6.219. This new functionality will better manage EFT Batches for companies using more than one Merchant ID.

Merchant ID's are now linked to a Branch within SedonaSetup. A new field has been added to the Branch Setup form where you will select the Merchant ID number that will be used when processing EFT transactions for customers within a given Branch.



- For SedonaOffice customers using more than one Merchant ID, make certain to submit pending transactions before you update to 5.6.219.
- After updating to 5.6.219, you <u>must</u> link your Branch records to the appropriate Merchant ID before submitting any new batches for funding.

📰 Branch Edit -			□ In <u>a</u> ctive
Branch	MI	Invoice Address 1	•
Description	Michigan	- SedonaSecurity 44789 Joy Road	
GL Code	10	- Canton, MI 48188	I
Merchant Id	314132	-	
		<u>A</u> pply <u>N</u> ew	Delete

#### **EFT Processing Form**

A new field, Merchant Id, has been added to the EFT Processing form. The Merchant ID shown will be the Merchant ID that is linked to the Customer's Branch.

Batch Inform	ation				🔍 View	Information					
Batch	Code ** Not Submitted **	1				Hold Date	7/15/	2014			
Total	Count 1	1				Branch	I		-		
Total /	Amount \$25.00	Auto	Non Re	cur	Submitted Tra	ansactions	ê	Batch Live (0)			and the second s
					Non-Sub Transac			Credi <u>t</u> Card <u>A</u> CH (0)	; (1)		and the second se
Lustomer #	Name	Amount	Type	Invoice	Funded	Response	Posted	Bank/CC	Account	Merchant Id	
11076	Detroit Dept of Education	8405.36	I	208153	N		N	VISA	****7985	314132	
121	Davis, Roger	69.28	I	211153	N		N	VISA	****1685	314132	
12864	Conway, Jordan	40.13	Ι	211227	N		N	VISA	****6516	314132	
230	Peter Strachan	13.37	Ι	220964	N		N	VISA	****6516	314132	
230	Peter Strachan	60.30	I	220963	N		N	VISA	****6516	314132	
23941	Williams, Jordan	38.86	Ι	203100	N		N	VISA	****3678	541145	
23941	Williams, Jordan	38.95	I	212368	N		N	VISA	****3678	541145	
9989	Spencer, Evan	80.65	I	220959	N		N	AMER	****7455	541145	
										$\smile$	1

## **Client Management**

#### **EFT Setup**

A new field has been added to the EFT setup form for both Credit Cards and Customer Banks. This new field, *"Days Past Inv [Invoice] Date"*, allows you to specify how many days after the Invoice Date, the EFT transaction will be available for processing. This new field overrides the current Hold Day field on the EFT setup.

A negative value may be entered into the *Days Past Inv Date* field; this would be done if you have dated your cycle invoices with a future date and want to process the EFT transactions immediately.

This new field is optional; if you leave this field set to the default value of 0, EFT's will continue to process as they did prior to the introduction of this new option.

If you would like to use this new field and would like to set all EFT records to the same value, please open a ticket on SedonaWeb, or contact <a href="mailto:support@sedonaoffice.com">support@sedonaoffice.com</a> to request assistance.

🔄 EFT Setup 23941 W	'illiams, Jordan		×
Lustomer Number: 2394 Williams, Jordan 14 Beverly Way Plymouth, MI 48170 (734) 826-0902	1		
Sustomer Banks Banks On File	<b>_</b>	Credit Cards	VISA
<u>B</u> ank Na <u>m</u> e on Account * (Not Business Name)		<u>N</u> ame on Card * <u>T</u> ype	Jordan P Williams
<u>A</u> ccount Number*	Checking Cavings	Card Number * Expiration * Bill Street Address Bill Postal Code	***** 3678 Edit  12 / 14  14 Beverly Way  48170
Payment Method Auto Processing Hold Day Days Past Inv Date	Recurring Non-Recurring	Payment Method Auto Processing Hold Day Days Past Inv Date	Visa
	<u>Apply</u> <u>D</u> elete	Print Cycle Invoi	ces Apply Delete
New Transaction			Glose



## **Client Management (continued)**

EFT Setup (continued)

#### Functionality

When entering a value in the *Days Past Inv Date* field, the application will add this number of days to the Invoice Date. This will populate the Hold Date field for the cycle invoice. For example, the Cycle Invoices are posted and dated 06/06/2014, and the EFT setup Days Past Inv Date field is set to 30. The EFT Hold date will be set to 07/06/2014, which is 30 days from 06/06/2014.



#### **Client Management (continued)**

#### **Next Customer/Previous Customer**

Two new buttons have been added to the main application button toolbar which when clicked, will advance to the next customer number or the previous customer number. The new feature is only available if your customer numbers contain only numeric characters.





#### **Client Management (continued)**

#### **Customer Part Pricing Level**

A new field, *Part Pricing Level*, has been added to the Customer *Setup Information* form. When clicking on the drop-down arrow in this field, six options are available: None, Level 1, Level 2, Level 3, Level 4 and Level 5. These Price Levels are linked to a new *Part Price Level* setup located on the Part setup form. Five different Part Price Levels may be setup for individual Parts. Please refer to the Part Pricing Levels topic under the Inventory section of the release notice for more information on how to setup the Part Price Levels.

If a Part Pricing Level is assigned to the Customer, this will affect the calculated price to the customer for all invoices where a part is a line item on the invoice including Jobs (if the Job Type allows for billing parts individually), Service Tickets, Inspection Tickets and Miscellaneous Invoices.

The Customer Part Pricing Level will override any other business rules setup on the Service Level assigned to Tickets.

S Customer Setup 221	1					×
Ustomer # 22		Price, Pamela 1 Price Lane				<u> </u>
· · · · · · · · · · · · · · · · · · ·	amela Price	Plymouth, MI	48170			
Additional Name		1				<b>T</b>
Setup Information Cu	ist Addt'l Information   Bill To   Ma	ster Account Setup	Items	Alternate Part	Descriptions	5
C <u>u</u> stomer Status	ANR	Blanket <u>P</u> .O.				
Customer Type	Residential	P.O. Expire Date				
Old Customer <u>I</u> D		Customer Since	5/29/20	)14		
<u>T</u> erms	Due On Receipt	C <u>h</u> ain Account			•	
Tax <u>E</u> xempt #		Customer <u>G</u> roup			•	
OK to Increase		Customer Group 2			•	
Salesperson	Oliver.Blais 💽 🔥	Branch	MI		-	
	and the second	No Collections	Г			
		Part Pricing Level	Level 1	l		
Master Account Inform		nvoice Printing	<u> </u>	Name		~
	Is Master Account	<ul> <li>Print Cycle Invo</li> <li>Print Statement</li> </ul>		lone .evel 1	_	
<u>M</u> aster Acct	•	Print Statement	-			
		Separate Cycle		evel 3		
	Sub Account Invoices to	🔽 Charge Late Fe	~~ _	evel 4 .evel 5		
Critical Message	Master A/R		E			
Expires On						
				<u>S</u> ave	⊆lose	



#### **Customer Part Pricing Level (continued)**

#### **Customer Default Part Price List**

A new option has been added to SedonaSetup *CM Data Entry Defaults*, which will allow you to specify the default *Part Pricing Level* that will be used when creating new customers. You may select one of the five Part Pricing Levels or set to the option of None.

Sedona Office Setup (SedonaSecurit File Find Find Next View Tools Help	y)								
Sedona Setup	Sedona Setup								
Description	Area								
Setup Processing	AR								
Statement Rules	AR								
Tax Groups	AR		😡 Data Entry Defaults			3	Cycle Billing De	efaults	
Tax Tables	AR								
Terms	AR								
Cancellation Profiles	CM		Branch	MI	•		<ul> <li>Monthly</li> </ul>	C Ouarterly	
Cancellation Tasks	CM		Dianch	Tor	<u> </u>				
Chain Accounts	CM			MT Ulavara Carata			🔿 Semi-Annua	al 🔿 Annual	
Collection Statuses	CM		Tax Group	MI-Wayne County	· ·				
Custom Fields Setup(Customer)	CM		_				Category	Monitoring	<b>-</b>
Custom Fields Setup(Site)	CM		Term	Due On Receipt	-		Invoice Desc	Recurring	-
Custom Fields Setup(System)	CM		System					, -	_
Custom Fields Table1 (Customer)	CM		System	Intrusion	-	>>	Job Billing Defa	a dha	
Custom Fields Table1 (Site)	CM					~	JOD BIIIING Dela	aurus	
Custom Fields Table1 (System)	CM		Contract Form	3 Year	•		Category	Jobs Com	•
Custom Fields Table2 (Customer)	CM							·	_
Custom Fields Table2 (Site)	CM		Country	United States	•		Invoice Desc	Installation Services	•
Custom Fields Table2 (System)	CM		í í				RMR Reason	New RMR	-
Custom Fields Table3 (Customer)	CM		Area Code					,	
Custom Fields Table3 (Site)	CM								
Custom Fields Table3 (System)	CM		Customer Type	Residential	-				
Eustomer Groups	CM								
Data Entry Defaults	CM	).		Residential	Commercia	al			
Payment Methods	CM			-					
RMR Escalations	СМ		Part Pricing Level	Level 1	<u> </u>				
RMR Reasons	СМ								
System Types	CM								
Type Of Customer	СМ								
Alarm Services	CS								



#### **Client Management (continued)**

#### **Alternate Part Descriptions**

A new option, *Alternate Part Descriptions*, has been add to the Customer Setup. When printing a customer invoice where a part on the invoice is contained in the list of the Customer's Alternate Part Descriptions, the description printed on the invoice will use the description saved in the Customer's Alternate Part Description list. Currently this option is only available on one particular custom invoice form.

😫 Customer Setup 2	221			×
Customer # Customer <u>N</u> ame <u>A</u> dditional Name	221 Pamela F	r r	Price, Pamela 1 Price Lane Plymouth, MI 48170	4
Setup Information	Cust Add	t'l Information   Bill To   Maste	er Account Setup Items Alternate Part Desc	riptions
Part Code		Alt. Code	Alt. Description	
1240 PN001		12V40B 001P	12V 4AH BATTERY Motion Detector	
PN002		202PN	Glassbreak Detector	
PN003		3003P	Door Contact	
Edit				
Alternate Co	de 📗			
Alt. Desc <u>ri</u> pti	ion /			
			<u>Apply</u> <u>N</u> ew !	<u>D</u> elete



#### Inventory

#### **Part Pricing Levels**

A new feature, *Part Pricing Levels*, is being introduced as of version 5.6.219. This will allow you to setup up to 5 Part Price Levels for each Part Number. Once the Part Price Levels have been created, if a Price Level is assigned to a Customer on the Customer Setup Information form, parts used on Jobs and Service Tickets will default to the Part Prices (if any) for that Price Level.

On the Part setup form, to the right of the *Sales Price* and *Service Price 1* fields is a new icon service in the sales Price or Service Price will open the *Part Pricing Levels* form to enter the information for up to five unique Part Price Levels.

🖻 Part Edit			×
Part PN001			🔲 Inactive
्रिंP <u>a</u> rt Det	ail 🛛 🛒 Vendors 🗎	📸 Alt. Parts 📔 🔜 Warehouses 📔 🔤 Custom Fields 📗	Documents (0)
Description	n		
	Description	Motion Detector	Part <u>K</u> it
	Detail	PN001 PIR Motion 60lb	🔲 Special Order
	Product Line	Motion Detectors	Customer Equipment
	<u>M</u> anufacturer	Bosch 💌 🛨	
	Man <u>u</u> f Part Code	PN001	🔽 Stock Item For Jobs
	Manuf <u>W</u> arranty	No Warranty	
	<u>U</u> .P.C		🔲 Ereeze All Purchasing
	Notes		Labor Data
Costing		1	Labor Units 1
costing	Method	Standard	
	PPV Account	120900	
	Direct <u>E</u> xp Acct	N/A	
AR Setup			
	Invoice Item	SVC Part-TX	
Sales —	Invoice Description	Mation Detector	
	Price		Available for Sales
Service	-		
	Invoice Description	Motion Detector	_
	Price 1	20.0000	Available to FSU
	Price 2	20.5000	
Labor Units	5	Save	Copy <u>C</u> lose

## Inventory (continued)

## Part Price Levels (continued)

Each Part Price Level contains three possible elements; Price, Labor Units and Labor Rate. The Price field is considered the base price of the part. You may also use a Labor Factor in conjunction with the Price field to calculate the total Price of the part.

For example, if the base part price is \$21.00, the labor units value is set to 1 and the labor rate is set to \$21.00, the total calculated price for the part will be \$42.00.

Price + (labor units x labor rate) = total part price.

S Part Pricing I	.evels		×
Part Code PN001		Description Motion Detect	or
Manufacturer Bosch		Manufacturer Pa PN001	art Code
Level 1 Price Labor Units	21.0000	Labor Rate	21.0000
Level 2 Price	22.0000		
Labor Units Level 3	1.0000	Labor Rate	22.0000
Price Labor Units	23.0000	Labor Rate	23.0000
Level 4 Price	24.0000		
Labor Units Level 5	1.0000	Labor Rate	24.0000
Price Labor Units	25.0000	Labor Rate	99.0000
	,	2	ave <u>C</u> lose

## **Inventory (continued)**

#### **Transfer Requests**

A new feature, *Transfer Requests* is incorporated into SedonaOffice as of version 5.6.219. This new feature changes the functionality of the Bulk Transfers that were previously performed from the main application Inventory menu.

The new Transfer Request feature was designed primarily for transferring parts from one branch warehouse to another, and providing tracking dates as to when the parts were shipped and when the destination warehouse actually received the parts.

When selecting the Transfers option from the Inventory menu, the new Transfer Requests list will be displayed. Any transfers that have not been completely received will be listed. From the Transfer Requests list, a new Transfer Request may be created, and existing Transfer Requests may be received or modified prior to receiving. Closed Transfer Requests may be opened and viewed by clicking on the *Include Closed* button.

Any Transfers made prior to updating to 5.6.219 will be listed when selecting the *Include Closed* button.

Single part Transfers may still be performed from a Part Explorer record without having to use the Transfer Requests Inventory option.

Transfer Re	equests					
Date	From Warehouse	To Warehouse	Reference	Memo	Status	State
5/29/2014	Main-MI	M101	Job #376	For Job 376	Shipped	Open
6/6/2014	Main-MI	Main-OH		Inter-branch	Requested	Open
<u> ا</u>				Include Closed	<u>R</u> eceive <u>N</u> ew	

## **Inventory (continued)**

#### **Transfer Requests Functionality-Shipped Parts**

To create a new Transfer Request, click on the *New* button located at the bottom of the Transfer Requests List. The Transfer Request form will be displayed.

- Select the *From Warehouse* and the *To Warehouse* from the drop-down lists
- Enter a <u>Memo</u> this field will allow up to 255 characters.
- Select the <u>Request Date</u>.
- The <u>In Process Date</u> would be selected when the parts are being pulled from stock. This may be entered at a later time. Once an In Process Date has been entered, the status of the Transfer Request will be changed to In Process.
- The <u>Shipped Date</u> would be selected when the parts have actually been shipped to the receiving warehouse. This may be entered at a later time. Once a Shipped Date has been entered, the status of the Transfer Request will be changed to Shipped.
- <u>For Job/Ticket</u> If the Parts are for a Job or Ticket, you may click on the drop-down arrow and select either Job or Service. If Job or Service is selected, in the Reference field, click on the lookup button to the right of the field to select the Job or Ticket number.
- In the lower area of the form, select the first part number and enter the quantity to be transferred. Click on the Add button. Continue until all parts needed have been added.
- When finished, click on the *Save* button located at the lower right of the form.

Transfer Reque	st							×
📑 Warehouse Sel	ection	Part Code	Source Qty	Dest Qty	Req Qty	Serial Number	Lot Number	Cost Method
<u>F</u> rom Wareho	use Main-MI	1025-WP	180	0	20			Standard
<u>T</u> o Warehous	e Main-OH 🔽	IM1270 W54945	231 138	1 0	40 25			Standard Standard
Memo	Inter-branch							
<u>R</u> equest Date	6/6/2014							
<u>I</u> n Process Da	ite 6/6/2014 🔳							
<u>S</u> hipped Date								
For Job/Ticke	t None 💌							
Reference	<u></u>							
	C Bring Quantity Up to Minimum C Bring Quantity Up to Ma <u>xi</u> mum C Manual <u>I</u> ransfer							
ुंद्धे Part Selection —								
<u>P</u> art Code	(12) 1221							
Transfer Quant								
<u>S</u> erial Number								
<u>L</u> ot Number		•						
	<u>N</u> ew <u>A</u> dd				Delete	Save	<u>S</u> ave/Receive .	<u>C</u> lose

#### **Inventory (continued)**

#### **Transfer Requests Functionality**

When the parts arrived at the "To Warehouse", the User will highlight the Transfer from the Transfer Requests list then click on the *Receive* button.

🧟 Transfer R	equests						
Date	From Warehouse	To Warehouse	Reference	Memo	Status	State	
5/29/2014	Main-MI	M101	Job #376	For Job 376	Shipped	Open	
6/6/2014	Main-MI	Main-OH		Inter-branch	Requested	Open	
•							
				Include Closed	Receive New		ose

The Receive Transfer Request form will be displayed. Enter the *Received On* date in the header area of the form. If all parts listed are being received, click on the *Save* button to complete and close out the Transfer. If not all parts are being received, enter the quantity being received in the Received Quantity column for each part.

🧟 Receive Transfer Requ	est			×
📑 Transfer Request Info –				
Requested 6/6/2014 by carolynj	From Wareho Main-MI	From Warehouse Main-MI		
In Process 6/6/2014 by carolynj	Shipped N/A			
Received On 6/8/2014	Received By			
ြို့ Received Quantity —				$\frown$
Part	Serial Number	Lot Number	Requested Qty	Received Qty
▶ 1025-WP			20	20
IM1270			40	40
WS4945			25	25
				Save Close

## **Inventory (continued)**

## Transfer Requests Functionality-Replenish Truck Stock

If you need to transfer multiple parts to a Technician/Installer warehouse, you may create a Transfer Request and Receive the Transfer immediately.

To create a new Transfer Request, click on the *New* button located at the bottom of the Transfer Requests List. The Transfer Request form will be displayed.

- Select the *From Warehouse* and the *To Warehouse* from the drop-down lists
- Enter a <u>Memo</u> this field will allow up to 255 characters.
- Select the <u>Request Date</u>.
- Set the *In Process Date* to date the parts are being given to the Technician/Installer.
- Set the *Shipped Date* to the same date as the In Process Date.
- In the lower area of the form, select the first part number and enter the quantity to be transferred. Click on the Add button. Continue until all parts needed have been added.
- When finished, click on the *Save/Receive* button located at the lower right of the form.

S Transfer Request							×
📑 Warehouse Selection	n ————————————————————————————————————	Part Code	Source Qty	Dest Qty	Req Qty Serial Number	Lot Number	Co
Erom Warehouse	Main-MI	IM1270	226	4	5		Sta
<u>T</u> o Warehouse	M100	IM1240	103	0	5		Sta
Memo	Truck Stock						
<u>R</u> equest Date	6/10/2014						
In Process Date	6/10/2014						
Shipped Date	6/10/2014						
For Job/Ticket	None						
Reference	會						
	<ul> <li>C Bring Quantity Up to Minimum</li> <li>C Bring Quantity Up to Maximum</li> <li>✓ Manual Iransfer</li> </ul>						
🔅 Part Selection ———							
 Part Code	凿						
Transfer Quantity							
<u>S</u> erial Number							
		•					Þ
	<u>N</u> ew			Delete	Save Save/Re	ceive Clo	se

#### **Inventory (continued)**

#### Transfer Requests Functionality-Replenish Truck Stock (continued)

The Receive Transfer Request form will be displayed; click on the Save button located at the lower right of the form. A confirmation message will be displayed; click on the Yes button to complete the transfer.

😫 Receive Transfer Requ	est				×	
📑 Transfer Request Info –						
Requested 6/10/2014 by carolynj	From Warehou Main-MI	ise	To Warehouse M100			
In Process 6/10/2014 by carolynj	Shipped 6/10/2014 by	d Status 014 by carolynj Shipped				
Received On 6/10/2014	Received By					
👸 Received Quantity —						
Part	Serial Number	Lot Number	Requested Qty	Received Qty		
▶ IM1240			5	5		
IM1270			5	5		
				Save	⊆lose	
	Receive Parts T	ransfer				





#### **Inventory (continued)**

#### **Transfer Requests Functionality-Serialized Parts**

For Transfer Requests that include one or more parts that are tracked using the Serial Number costing method, the process is very similar to the shipping of parts or the stocking of vehicles. When selecting a serialized part, a form will be displayed from which you will select the serial number to be transferred. The remainder of the process is the same.

S Transfer	Requests							_ 🗆 ×
Date 6/9/2014	- S Transfer Request	1 1	1	il.	<i>L</i>		×	
6/9/2014	拱 Warehouse Selection	I	Part Code	Source Qty	Dest Qty Req Qty	Serial Number Lot Nu	umber Co	
	<u>F</u> rom Warehouse	Main-MI	Serial Numbers	- 5N002				×
	<u>T</u> o Warehouse	M100			[			
	<u>M</u> emo		Receipt Date 6/10/2014	PO Number 1000	Serial Number 1234	Lot Number	Cost 50.00	
	<u>R</u> equest Date	6/10/2014	6/10/2014 6/10/2014	1000 1000	1235 6541		50.00 50.00	
	In Process Date	6/10/2014	6/10/2014	1000	6547		50.00	
	Shipped Date	6/10/2014						
	For Job/Ticket	Service						
	Ticket Number	3182						
		Bring Quantity Up to Minimum     Bring Quantity Up to Maximum     Manual Iransfer	-					
	ुंद्धे Part Selection							
		5N002						
	Transfer <u>Q</u> uantity	1						
	<u>S</u> erial Number							
			L					
		<u>N</u> ew <u>A</u> dd						
			-					
							Select Close	·

## **Inventory (continued)**

#### Part Explorer

Changes have been made to the Part Explorer to display information related to the new Transfer Requests feature. On the Part Tree within a Warehouse, two new options are listed; Transfers - Open and Transfers - Closed. All part transfers performed prior to updating to 5.6.219 will be listed in the Transfers – Closed area.

Two new fields have been added to the Warehouse information which is displayed in the upper right pane of the Part Explorer when highlighting a particular warehouse from the Part Tree. The two new fields are *Pending XTFR In* and *Pending XTFR Out*. Quantities will be listed in these new fields once an *In Process Date* has been entered on a Transfer Request.



## **Inventory (continued)**

#### Warehouse Explorer

Changes have been made to the Warehouse Explorer to display information related to the new Transfer Requests feature. On the Warehouse Tree, two new options are listed; Transfers - Open and Transfers - Closed. All part transfers performed prior to updating to 5.6.219 will be listed in the Transfers – Closed area.

Main-MI Parts Negative Parts Purchase Orders Purchase Price Variances Repair Orders Transfers - Open	Warehou Descript Account Branch (	ion N Code 1	4ain-MI 4ain-Michi 120000 4I	gan					
Transfers - Closed	Date	From Whse	To Whse	Part Code	Description	Quantity	Job/Ticket	Received Qty	Received By
	5/29/2014	Main-MI	M101	69	# 69 DOOR CORD		376	0	
	5/29/2014	Main-MI	M101	AXSM3011	AXIS M3011 MINI DO		376	0	
	6/6/2014	Main-MI	Main-OH	IM1270	12V 7AH BATTERY	40		0	
	6/6/2014	Main-MI	Main-OH	1025-WP	Wall Plate Blank - White	20		0	
	6/6/2014	Main-MI	Main-OH	WS4945	WLS DOOR WINDOW	25		0	

Main-MI									
Main-MI	Warehou	Jse	Main-MI						
🐉 Parts	Descript	ion	Main-Michiga	n					
🚯 Negative Parts				•					
Purchase Orders	Account		120000						
🕯 Purchase Price Variances	Branch (	Code	MI						
Repair Orders									
Transfers - Open									
S Transfers - Closed	<u> </u>								
Journal	Date	From Whse	To Whse	Part Code	Description	Quantity	Job/Ticket	Received Qty	Received By
	6/7/2014	Main-MI	Main-OH	028741-32	6210 STRIKE	3		3	Administrator
	6/7/2014	Main-MI	Main-OH	02CCAMKT	COLOR CAMERA KIT F	2		0	Administrator
	6/7/2014	Main-MI	Main-OH	1332	9V TRANSFORMER	2		0	Administrator
	6/7/2014	Main-MI	Main-OH	VN02872185	6210 ELECTRIC DOOR	3		1	Administrator
	6/7/2014	Main-MI	Main-OH	02CCAMKT	COLOR CAMERA KIT F	2		2	Administrator
	6/7/2014	Main-MI	Main-OH	1332	9V TRANSFORMER	2		0	Administrator
	5/29/2014	Main-MI	Main-OH	1240	ULTRATECH 12V 4AH	5	350	5	Administrator
	5/28/2014	Main-MI	Main-OH	995	RECESS MOUNT PIR M	2		0	carolynj
	5/28/2014	Main-MI	Main-OH	HR1214W	12 VOLT 1.4AH BATTERY	3		0	carolynj
	5/28/2014	Main-MI	Main-OH	34026	3.5 LITHIUM BATTERY	7		7	carolynj
	5/2/2014	Main-MI	M100	1240	ULTRATECH 12V 4AH	1		1	Administrator
	5/2/2014	Main-MI	M100	N/A	N/A	3		3	Administrator
	3/24/2014	Main-MI	M100	IM1270	12V 7AH BATTERY	5		5	Administrator
	2/26/2014	Main-MI	M100	WG11035507	22/4 WIRE BURG 500	1		1	Administrator
	2/21/2014	Main-OH	Main-MI	WG11035506	22/4 WIRE BURG 500	1		1	Administrator
	2/21/2014	Main-MI	Main-OH	6160	ALPHA ENGLISH KEYPAD	1		1	Administrator
	2/21/2014	Main-MI	Main-OH	WG11035506	22/4 WIRE BURG 500	1		1	Administrator
	2/21/2014	Main-MI	Main-OH	WG11035506	22/4 WIRE BURG 500	499		499	Administrator
	1/20/2014	Main-MI	M100	AURORA	PET IMMUNE PIR	1		1	Administrator
	1/13/2014	Main-MI	MI-Cust Repair	IA-1000	IA-1000	1		1	Administrator
	9/30/2013	Main-MI	Obsolete-MI	WINWB200	WATER BUG WATER S	1		1	Administrator

#### Job Management

#### Job Task List-Schedule Date

Three new columns have been added to the Job Task List; *Scheduled, Last Tech,* and *Last Dispatch*. These new columns are designed to provide information as to when a particular Task is to be scheduled, and to display the name of the most recent Technician along with their Job Appointment Dispatch date and time.

The Scheduled Date that appears in the Job Task List is entered on the Job Task form. If a date is entered into the *Schedule Date* field on a Job Task, the Job will appear in a new "Upcoming Tasks [to be scheduled]" list with the SedonaSchedule Job Listing. Once the Job Appointment is created and the person scheduling the Job approves the Job Task within the Job record, the item will drop off of the To Be Scheduled List in SedonaSchedule.

🕒 Job - 381 (Par	nela Price)				
Job	Job	Customer 221	Site		
Sales Summary		Pamela Price Price, Pamela 1 Price Lane Plymouth, MI 48170	Pamela Price 1 Price Lane Plymouth, MI 48170		
Work Order	Tasks				
Job System Approvals Tasks	#         Phase         Task           1         Prewire         Order Parts           2         Prewire         Sch Prewire           3         Prewire         Sch Prewire           4         Install Devices         Order Parts           5         Install Devices         Sch Install           6         Install Devices         Install           7         Install Devices         Jobcost	Scheduling N Prewire Y Parts N Scheduling N Install Equipment Y	C Scheduled Last Tech Last Dispatch	Approved Approved By	Comments
Installs \$1,500.00	*The job will be locked and the status will be set t	to Job Complete when all tasks in the	job are approved.		
Recurring \$35.00 Labor	Job Task Sch Prewire Job Status Scheduling Phase Code Prewire Schedule Date 6(4/2014	Comments Se	quence Locks Job		
Cost Details Journals	Invoice				



#### Job Management (continued)

#### **Notes List**

A new button, "List", has been added to the Job Notes form. When clicking on the List button, all Notes entered for the Job will be displayed in chronological order. The most recent note will be at the bottom of the list of notes.





## SedonaSchedule

## Upcoming Tasks [to be Scheduled] List

A new option, Upcoming Tasks, has been added to the Open Jobs List in SedonaSchedule. When

clicking on the new green checkmark button at the top of the Job List, a listing of Jobs that need to be scheduled will be displayed. Also in the header area are two fields to select how many weeks back and ahead that you want to view the Job Tasks which need to be scheduled. Once the User approves that Task in the Job record of the main application, the row will drop off of the Upcoming Tasks list in SedonaSchedule.

+	> + + +     SedonaSchedule - SedonaSecurity 5.6.216     - •									- 🗆 X		
View	Service Option	IS										
Show/Hide Calendar Bar	Today Day	Week Month	Ticket Group Queue Tickets	💛 🧿 м	moved Parts iscellaneous Appointments ien Jobs	S Open Custor Refresh Scho Ticket						
Naviga	tir			ngement		Tool	5					
	Wks back 1 🗄			copens Schedule T	otal Upcoming Tasks: 3						_	
Drag a colum	in neader here to g	roup by that colu	mn.					$\frown$				
Ē Job # △ ▽		Commercial 🗸				7 City	✓ Task Code 1	⊽ Schedule Date 🖓	Last Service Tech 🛛 🖓			Percent Co
▶ 370	21711	N	CCTV · Large C_	Hill, Cristopher	81 Field Stone Run	Solon	Instal	06/02/2014			Installation	0.00
381	221	N	Intrusion - Resid	Pamela Price	1 Price Lane	Plymouth	Sch Prewire	06/04/2014		06/04/2014	Schedule Prewire	0.00
381	221	N	Intrusion - Resid	Pamela Price	1 Price Lane	Plymouth	Sch Install	06/05/2014		06/04/2014	Schedule Install	0.00

#### SedonaSchedule (continued)

#### **Bill Ticket to Next Cycle**

A new feature has been added to SedonaSchedule which allows you to invoice all the charges for a Ticket on the next Cycle Invoice that will be created for the System. If there are recurring lines setup at the System Level for the System on the Ticket, and the next cycle date is beyond the current month, on the Ticket Billing form, the *Bill to Cycle* area will display the next cycle date. If the User clicks on the

Add to Next Cycle button Add to Next Cycle, the charges are tagged to appear on the next cycle invoice. Any expenses for the Ticket will record to the General Ledger as normal, however, no income will be recorded for the Ticket until the customer's next cycle invoice is posted.

Access to the new *Add to Next Cycle* button is controlled by a new User Group Security option. This new security option is found in the SV permissions area and is labeled "*Bill Ticket to Cycle*".

		Ticket #3170	x
	Ticket	Central Station	
Service Ticket	Custom Fields		
Custome	r 105 Ashlev	i Created 6/7/2014 9:01:32 AM Contact	<b>*</b>
Site	Victori	oria Rose Flower Shoppe Created By carolynj Phone Phone	Ext
		i N Main mouth MI 48170- Status Resolved Notify	
Contac Invoice	t	es V Override Warranty Override Service Level Total Parts 191.25 Total Parts 191.25 Total Labor 240.00 Total Other 80.00 Sub Total 511.25 Total Pending Ticket Resolution V Bill to Cycle Next Cycle Date 7/1/2014	Tax           13.39           16.80           5.60           35.79           \$547.04
		Add Resolution Note to Invoice     Close Ticket After Adding to Cycle     Close Ticket After Invoicing	Add to Next Cycle
-	ent Receive ttance	eived	

#### SedonaSchedule (continued)

#### **Ticket Comments Security**

A new User Group Security option, "Edit Customer Comments", has been added to the SV permission group. If the User is not granted this permission, they will not be able to edit the Comment field on the Service Ticket form after the initial save of the Ticket.

In the screen shot below, the User does not have permission to edit the Comments field; notice the field is dimmed out and not available for data entry.

		١	Ficket #2952
Ticket	Central Station		
Service Ticket	Appointments Billing Docum		Notes Other Purchase Service Ticket (1) Items Orders (0) Fistory Log Group Notifications
Site Micha 2235↑	on, Michael el Johnson viills uth MI 48170		4:17:53 AM Contact tor Phone Ext Notify
Site and System I System Account System Type Panel Type Location Next Inspection Site Phone Map Code Cross Street Warranty	Detail 3350-0 Intrusion UNKNOWN 3780 3/1/2014 12:00:00 AM (734) 563-1459 9119 3780 One Year P & L		Ticket Detail  Problem Code Changes  Secondary Problem Route Code  Expertise 4  Priority Low Estimated Length 60 Comments change code for Michael Johnson Sr.
Warranty End Memo	Expired 9119		Service Coordinator carolyni
Comments			P0 #
Notes			

#### SedonaSchedule (continued)

#### **Ticket Queue – New Fields**

Three new fields have been added to the Field Choose List in the Ticket Queue. These new fields are Panel Type, Customer Branch and Site Branch.

ے ( م	F Ŧ	Service Tic	ket Queue O					Sedona	Schedule - Sedon	aSecurity 5.6.216		
- 1	View Servic	e Options 🛛 🔾	ueue									
Show/Hic Calendar E	Bar	Day Week Month	Ticket Queue Group Inspectio Creation	O Mis		s Appointments	U Warning Warning List	t <b>+</b>	Tickets On Site Tickets List 🔹	<ul> <li>Open Customer</li> <li>Refresh Schedule</li> <li>Ticket</li> </ul>	箭	
Nav	vigation		Arrangement					SedonaMonit	or	Tools		
Ticket *	✓ Created On	a realito	∽ Site Address ⊽			Zip/Pos 4 ▽	Cust Branch	Site Branch	√ Panel	⊽ \$cheduled ⊽	Techni 🗸	Cust Comme
3006	03/17/2014											
	00/11/2014	Emilie Bruc	e 8 Oakwood Av	Plymo	Michigan	48170	M	MI	FBI 4600	3/17/2014 1:00 P.	. Marshall	Smoke dete
3034	03/30/2014		e 8 Oakwood Av a 231 Firestone Drive	Plymo Plymo	-		MI	MI MI	FBI 4600 VISTA 1288			Smoke dete
3034 3033		Service, S			-	48170	MI MI			BP 3/18/2014 1:00 P.	. Mark Tay	Smoke dete
	03/30/2014	Service, S Service, S	a 231 Firestone Drive	Plymo	Michigan	48170 48170		МІ	VISTA 128	BP 3/18/2014 1:00 P., BP 3/18/2014 2:00 P.,	. Mark Tay Mark Tay	Smoke dete
3033	03/30/2014 03/30/2014	Service, S. Service, S. Michael Jo	a 231 Firestone Drive a 231 Firestone Drive	Plymo Plymo	Michigan Michigan	48170 48170 48170	М	MI MI	VISTA 1288 VISTA 1288	BP 3/18/2014 1:00 P BP 3/18/2014 2:00 P	. Mark Tay Mark Tay	Smoke dete
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3033 3099 3150	03/30/2014 03/30/2014 04/10/2014 05/29/2014	Service, S Service, S Michael Jo Pamela Pri Ashley, Vic	a 231 Firestone Drive a 231 Firestone Drive A 2235 Mills c 1 Price Lane	Plymo Plymo Plymo Plymo	Michigan Michigan Michigan Michigan	48170 48170 48170 48170 48170 48175	MI MI MI	MI MI MI MI	VISTA 1288 VISTA 1288	BP 3/18/2014 1:00 P BP 3/18/2014 2:00 P	. Mark Tay Mark Tay Madison	
3033 3099 3150 2928	03/30/2014 03/30/2014 04/10/2014 05/29/2014 02/07/2014	Service, S. Service, S. Michael Jo Pamela Pri Ashley, Vic Ashley, Vic	a 231 Firestone Drive 231 Firestone Drive 235 Mills C 1 Price Lane 1. 1022 Wayne Road	Plymo Plymo Plymo Plymo Salem	Michigan Michigan Michigan Michigan Michigan	48170 48170 48170 48170 48175 48175	MI MI MI MI	MI MI MI MI MI	VISTA 1288 VISTA 1288	BP         3/18/2014 1:00 P.           BP         3/18/2014 2:00 P.           N         4/10/2014 9:00 A.	. Mark Tay Mark Tay Madison	
3033 3099 3150 2928 3068	03/30/2014 03/30/2014 04/10/2014 05/29/2014 02/07/2014 04/02/2014	Service, S. Service, S. Michael Jo Pamela Pri Ashley, Vic Ashley, Vic Ashley, Vic Ashley, Vic	231 Firestone Drive     231 Firestone Drive     231 Firestone Drive     2235 Mills     1 Price Lane     1022 Wayne Road     1022 Wayne Road	Plymo Plymo Plymo Plymo Salem Salem	Michigan Michigan Michigan Michigan Michigan	48170 48170 48170 48170 48175 48175 48175	MI MI MI MI MI	MI MI MI MI MI MI MI	VISTA 1288 VISTA 1288 UNKNOWN	BP         3/18/2014 1:00 P.           BP         3/18/2014 2:00 P.           N         4/10/2014 9:00 A.	. Mark Tay Mark Tay Madison Marshall	testinbg

#### SedonaSchedule (continued)

#### **Notes List**

A new button, *List*, has been added to the bottom of the Ticket *Notes* form. When clicking on the *List* button, all Notes entered for the Ticket will be displayed in chronological order. The most recent note will be at the bottom of the list of notes.





## SedonaSetup

#### Service Company Subcontractors

A new tab, *Subcontractor*, has been added to the Service Company setup table to allow you enter specific information related to the company. This new tab is only available for Service Providers (check the Include Vendors checkbox on the Service Company setup). If the Service Provider is assigned to a Ticket, when hovering your mouse over the Service Company field on the Ticket, an information bubble will display with any information entered on the Subcontractor form or any of the three additional forms (Insurance, Licenses, Travel). On the Licenses and Travel forms, all fields are text type and will allow up to 50 characters.



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## Version 5.6.219 Release Notice

- 😫 🖡	Ticket #3171 X
Ticket	Central Station
Service Ticket	Image: Second Labor       Image: Second Labor<
Site Pamel 1 Price	Ia Price     Created     6/8/2014 6:05:19 AM     Contact       Ia Price     Created By     carolynj     Phone       E Lane     Status     Scheduled     Notify
Site and System I System Account System Type Panel Type	Detail Ticket Detail 221 Problem AC Power Failure Intrusion Secondary Problem Route Code
Location Next Inspection Site Phone Map Code Cross Street Warranty Warranty End Memo	Subcontractor Info: Hire Date: 1/1/2011       3         Payment Method: American Express Other Iten:: Fuel Surcharge       Medium         Amount: 25.00       icense: Elect: MI 3565580         License: Contr: MI C765542       Service Rate (Standard): 150.00         Service Rate (Weekend): 175.00       Full Warranty         Expired       Trip Charge: 90.00         Travel:       Area: 90 Miles from Office         Distance: 50 Miles       ABC Service Provider
Comments Notes Service Company Service Level Receiver/Transmitte	Turn Around Time: 2 days       Insurance:       Auto Insurance Expires: 12/31/2014       Liability Insurance Expires: 12/31/2014       Worker's Comp Expires: 12/31/2014       Image: Complex C
	Vendor Service



## SedonaSetup (continued)

#### **Instruction Notes**

A setup table, *Instruction Notes*, has been added to the SV area of SedonaSetup. This setup table is used to create a list of special instructions that may be added to any Ticket. The *Name* field is a text field and will allow up to 50 characters and the *Note* field, which is also a text type field will allow up to 1,024 characters. Once a list of Instruction Notes has been created, they may be inserted manually into any Ticket on the Notes form by clicking on the new *Instructions* button.

Instruc	ctions Notes			
	Instruction Notes L	.ist		
	Instruction Name		Instruction Note	Inactive
	CCTV Repair Smoke detector rep	air	Always checks the wiring before you open up the box. It may e Don't try and fix it. Just rip it off the ceiling and install a new on	N N
_	Include Inactive	9		
=	Instruction Note -			In <u>a</u> ctive
	Name	Smoke detector r	repair	
	Note	Don't uy and fix f	it. Remove and replace with a new device,	4
			<u>Apply</u> <u>New</u>	Delete
ite P	and Appointments Bill and Labor 21 amela Price amela Price Price Lane tymouth MI 48170	(0) and F Created Select Instructions Name Smoke detector repail Instructions	Parts (0) Items Orders (0) History Log Group Notific Go To Notific 6/6/2014 6:05:26 AM Contact	Et Edled By
iccess Level	2 - Customer Restricted	Resolution Note		w Save

## SedonaSetup (continued)

#### **User Group Security**

Several new permissions have been added to the SV group of User Group Security.

• <u>Export Ticket Queue</u> – If this permission is granted, the User will be able to click on the Export to Excel Button located on the Queue Ribbon.

ß	) 1	+ = Service 1		rvice Ticket	Queue O						SedonaSche	dule - SedonaSeo	urity 5.6.216	
9	1	View	Service Options		Que	ue								
Op	en A		t No Appointment	Go Back	Resolved	Unresolved C		Queue View Use D Marchart Export	Date Range		-			
	_					View	6			1				1
						1011								
Dra	ig a co	olumn hea	ider here to gro	ip by th	at column.									
4				ıp by th ▼ Na	_		7	City 🔽	State 🗸	Zip/Pos 4 🗸	Cust Branch	⊽ Site Branch ा	7 Panel	⊽ Scheduled
T		olumn hea ▼ Creater 03/17/2	d On	\ √ Na	ame 🗸		V		State ▽ Michigan		Cust Branch	⊽ Site Branch T	Panel	√ Scheduled 3/17/2014 1:00 F
Т 3	ficket *	▽ Creater	d On 2014	∨ Na Em	ame 🗸 nilie Bruce	Site Address		Plymo		48170				
1 3 3	Ficket 1 8006	✓ Creater 03/17/2	d On 2014 2014	V Na Em Se	ame ⊽ hilie Bruce rvice, Sa…	Site Address 8 Oakwood Av	ve	Plymo Plymo	Michigan	48170 48170	МІ	MI	FBI 4600	3/17/2014 1:00 F
1 3 3	Ficket 1 8006 8034	Creater 03/17/2 03/30/2	d On 2014 2014 2014 2014	V Na En Se Se	ame ⊽ hilie Bruce rvice, Sa…	Site Address 8 Oakwood Av 231 Firestone Driv 231 Firestone Driv	ve	Plymo Plymo Plymo	Michigan Michigan Michigan	48170 48170 48170	MI MI MI	MI MI MI	FBI 4600 VISTA 128BP VISTA 128BP	3/17/2014 1:00 F 3/18/2014 1:00 F
1 3 3 3 3	Ficket 1 8006 8034 8033	Creater 03/17/2 03/30/2 03/30/2	d On 2014 2014 2014 2014 2014	V Na En Se Se Mi	ame 🔽 nilie Bruce rvice, Sa rvice, Sa chael Joh	Site Address 8 Oakwood Av 231 Firestone Driv 231 Firestone Driv	ve ve	Plymo Plymo Plymo Plymo	Michigan Michigan Michigan	48170 48170 48170 48170 48170	MI MI MI	MI MI MI	FBI 4600 VISTA 128BP VISTA 128BP	3/17/2014 1:00 F 3/18/2014 1:00 F 3/18/2014 2:00

- <u>Edit Customer Comments</u> If this permission is granted, the User will be able to edit the Comments field on the Service Ticket form after the initial save of the Ticket. Users not granted this permission will be able to enter text into the Comments field when initially creating a ticket. Once the ticket is saved, the Comments field will be dimmed out and will not allow any changes.
- <u>Bill Ticket to Cycle</u> If this permission is granted, the Add to Next Cycle button will be available to mark the billable charges to be invoiced on the next cycle invoice.

C <u>o</u> de D <u>e</u> scriptio Administrator Administra		Level Credit Memo Limit 3 💽 \$100,000.00
Application Access Report Access	1	
Access	Module	
Able to Remove Parts from Service Tid	:kets SV	
Use New Service	SV	
Override Billable Charges	SV	
Change Ticket Category	SV	
Select Closed Service Ticket for Costin	ng SV	
Override Parts Reconcile	SV	
Export Ticket Queue	sv	
Edit Customer Comments	SV	
Bill Ticket to Cycle	SV	
General Documents	DX	
Allow Document Edit (All Documents)	DX	
Allow Document Delete (All Document:	s) DX	
SQL Query Window	55	-1

## **Application Corrections**

## **Accounts Payable**

Close Out Vendor Returns (Support Ticket# 73954): Corrected a reported issue; Unable to close out a Vendor Return if no credit is expected if the accounting period has been closed. They checkbox "Close – No Credit" is now available for closed accounting periods. Vendor Returns will be written off as of the date the checkbox is selected and the record is saved. The G/L account used to clear the Inventory Receipts account will be the account set up in A/P GL Account Defaults/Write Off Non-Bill Receipt Acct.

## **Accounts Receivable**

- Job Credit Memo for Master Accounts (73479): Corrected a reported issue; when a Credit request is created for the purpose of changing the tax group on a job invoice (within job) for a subaccount where invoices are flagged to post to the Master Account, the credit is being posted to the subaccount instead of Master Account and posts the new invoice to Subaccount instead of Master Account.
- Credit Request Assigned To Employee (Support Ticket# 74247): Corrected a reported issue; when changing the Assigned To on Credit Requests, inactive employees were appearing on the drop-down list.

## **Client Management**

- Job Documents (Support Ticket# 72059): Corrected a reported issue; documents attached to Tickets were appearing in the Job Documents folder within the customer tree.
- **Recurring Line Last Rate Increase Date (Support Ticket# 71901)**: Corrected a reported issue; when performing a rate increase from the customer explorer, the recurring line was not being updated with the last rate increase date.

## Job Management

• Job Appointments (Support Ticket# 73198): Corrected a reported issue; after entering dispatch times for Job Appointments, the Job Appointments List would display the words "completed" instead of displaying the Dispatch, Arrived, and Departed date/time.

## Application Corrections (continued)

#### SedonaDocs

• Job Documents Folder: Corrected a reported issue; Documents saved to Tickets were appearing in the Job Document folder.

## SedonaSchedule

- **Charges Printed on Ticket**: Corrected a reported issue; when printing a Ticket, the charges displayed in the Charges Block did not always agree with the information shown on the Billing form of the Ticket.
- Queue Settings not being Remembered (Support Ticket# 62868): Corrected a reported issue; when closing SedonaSchedule using the Wrench Icon in the upper left corner of the application, the User's Queue settings were not being remembered.
- Inspection Ticket Category (Support Ticket# 63854): Corrected a reported issue; the default service category was always being assigned to Inspection Tickets. Now the Category assigned to the Service Company for the Inspection Ticket will be used when generating new Inspection Tickets.
- **Resolved Ticket Queue Refresh (Support Ticket# 73942)**: Corrected a reported issue; after closing a ticket from the Resolved Ticket Queue, the application was not refreshing the list of tickets or count at the bottom of the list.
- SedonaSchedule Crashing when dragging appointments: Corrected a reported issue; under certain circumstances, when the Auto-Refresh is turned ON, the application would crash when dragging appointments within the schedule board.
- **Clock In on Job Appointments (Support Ticket# 74460)**: Corrected a reported issue; when two techs are scheduled on a job and they are both clocked out for lunch on the schedule, the application was allowing only one of the techs to be clocked in.



## Application Corrections (continued)

 Do Not Allow Negative Parts (Support Ticket# 74481): Corrected a reported issue; when the Inventory Setup option "Do Not Allow [Negative Quantities]" is in force, parts were allowed to go negative in a warehouse when enough stock was not available. A new message will be displayed and will stop the user from saving a quantity of a part where there is not enough in the warehouse.



If the Inventory Setup option is set to "Display Warning Message", the user will be presented with a message, but be allowed to save the part to the ticket if the quantity would cause the inventory in the warehouse selected to go negative.



#### **Report Manager**

- **RMR 12-Month Roll-Forward\***: Corrected a reported issue; when selecting the "End of Month" option, no data was being returned in the report.
- Closed Service Ticket Cost\*: Corrected a reported issue; when