SedonaOffice
The #1 Financial Software for Security Companies

SedonaOffice Release Notice

SedonaOffice

Version 5.6.224

Last Updated: 27-August-2014

SedonaOffice

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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.

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This document may be updated periodically, be sure to check our website at www.sedonaoffice.com for the most current version.

Overview

This document is being provided to explain the changes made to the SedonaOffice application since Version 5.6.220. This is an intermediate version update that contains new features and application corrections.

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Application Enhancements/Improvements

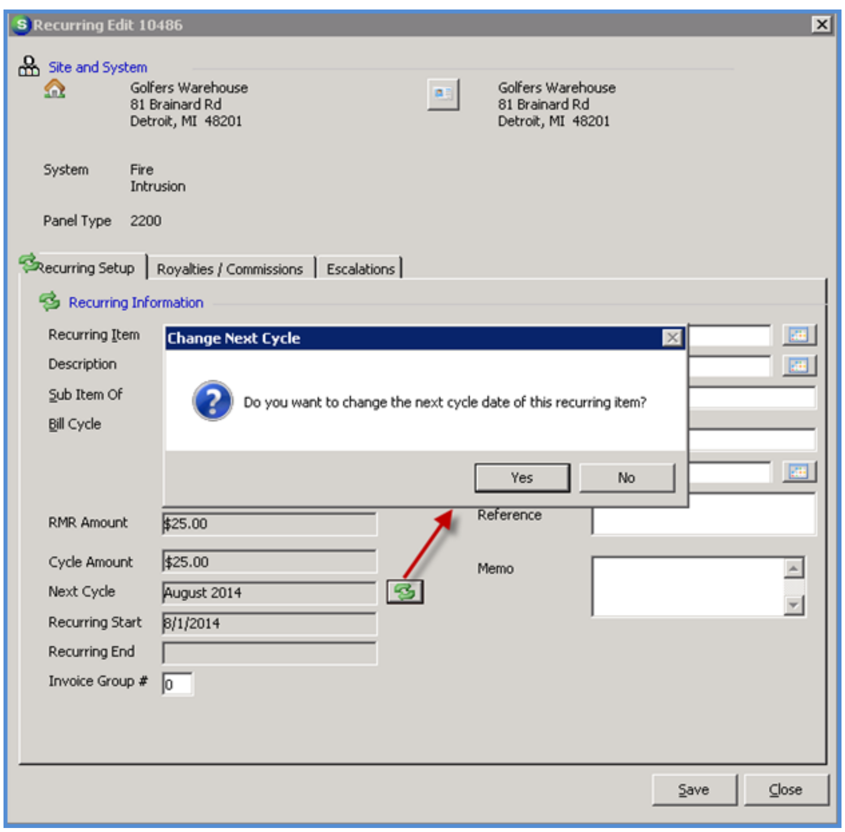
Client Management

Change Next Cycle Date

A new button has been added to the Recurring Line to enable the user to change the Next Cycle Date. This option could be used under the circumstances listed below.

- A data entry error was made when initially saving a new Recurring Line and you do not want to delete the line and re-enter.
- A customer requests their billing cycle be changed; for example from annual to monthly. If the annual invoice had already been produced, you would need to credit off the invoice, change the Next Cycle Date, and then you may manually cycle the customer or let the recurring line be picked up in the next regularly scheduled cycle billing batch.
- You may want to “Suspend” recurring services for a certain period of time i.e. skip one or more billing cycles.

Note: If the Next Cycle Date is changed, an entry is made into the Sedona Event Log for the customer.



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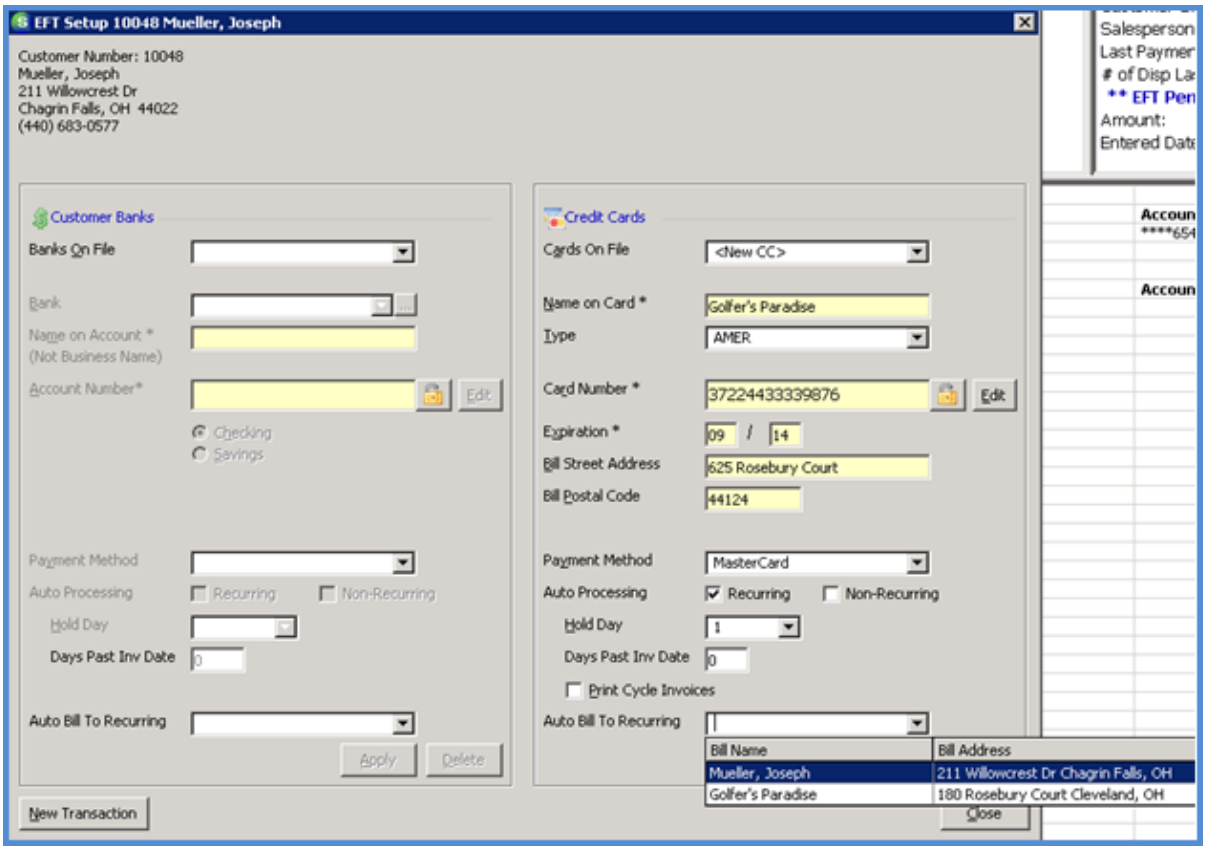
Application Enhancements/Improvements (continued)

Assign a Bill To Address to a Specific Bank or Credit Card

A new field, "Auto Bill To Recurring", has been added to the EFT Payment Setup form. When more than one Bill To record is present on a customer, you may now assign a different credit card or bank account number to each bill to record which could be used for payment of recurring charges.



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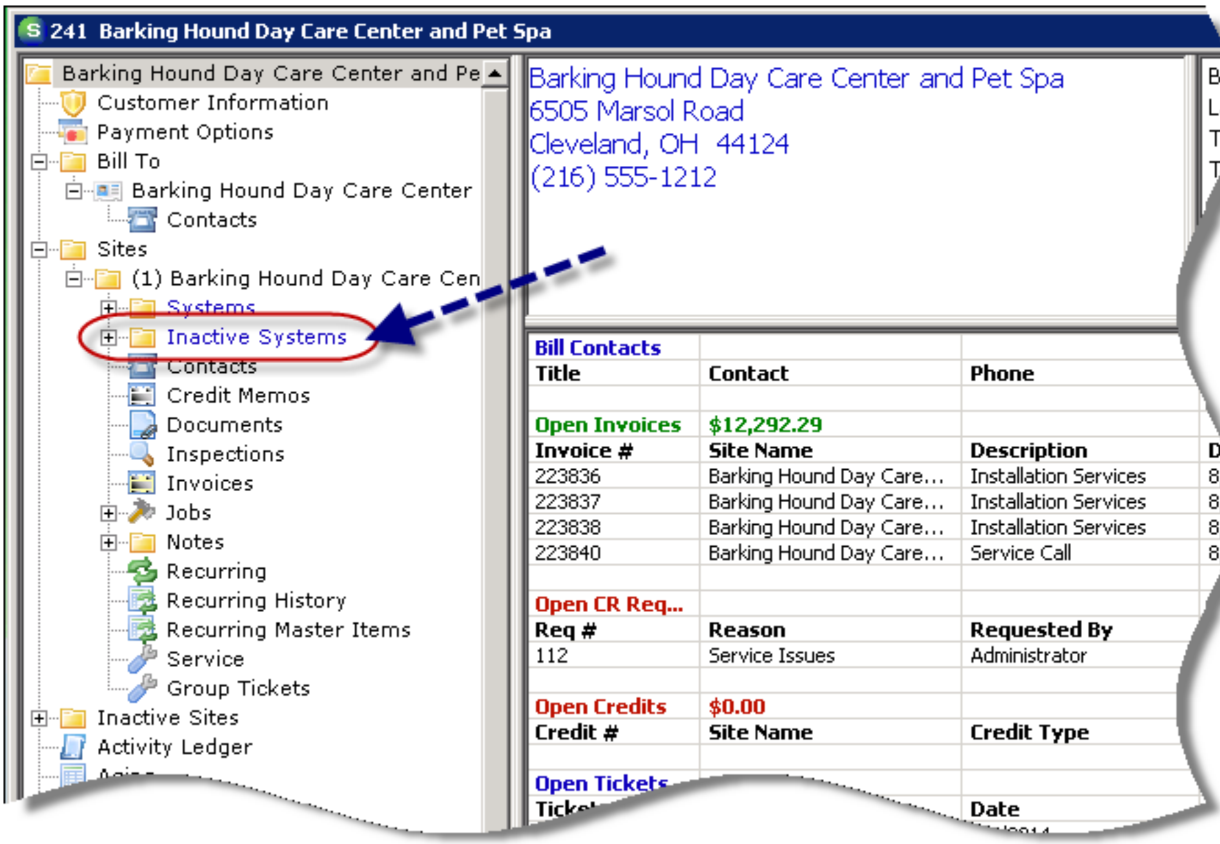
Application Enhancements/Improvements (continued)

Inactive Systems

A new folder, "Inactive Systems", has been added to the Customer Tree within the Customer Explorer. Both Active and Inactive Systems may now be accessed from the customer tree.



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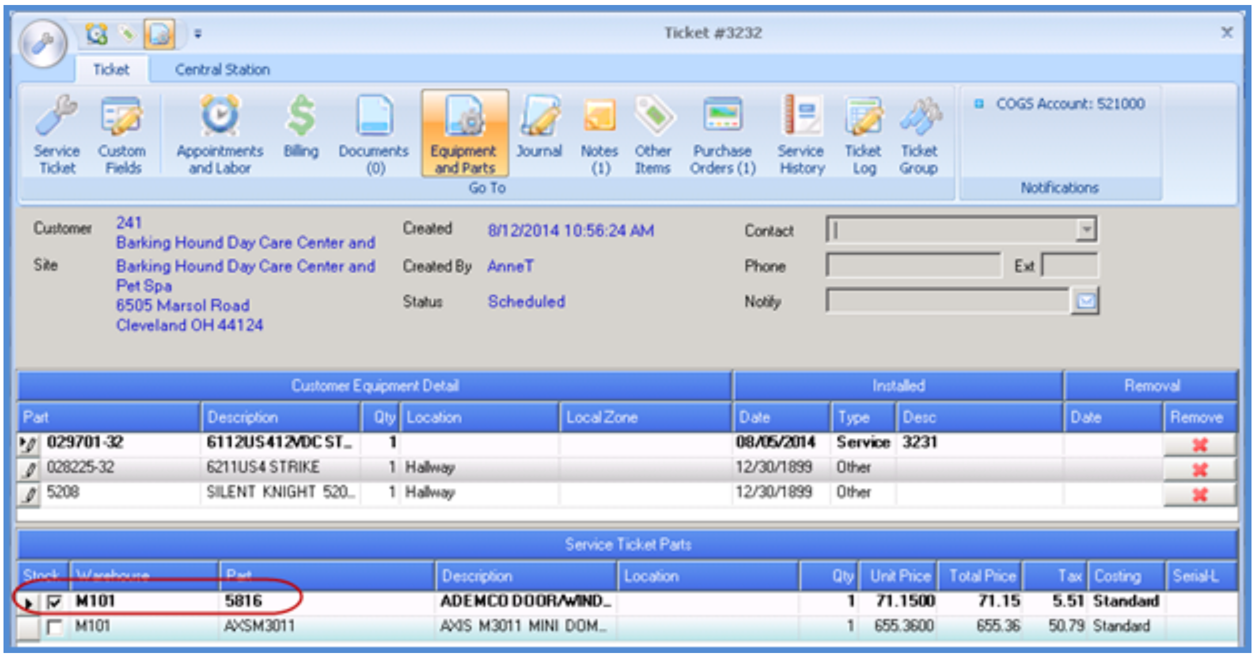
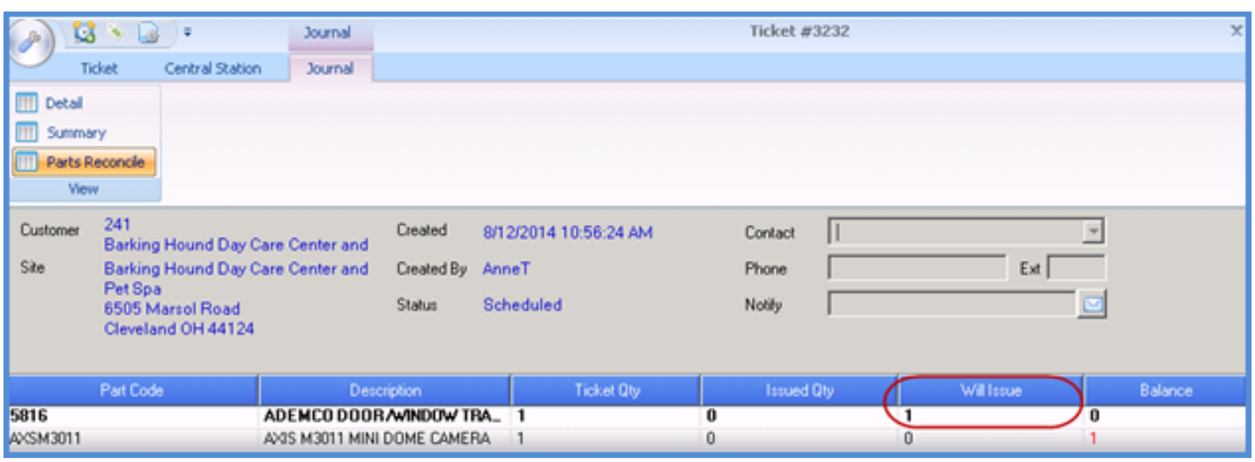
Application Enhancements/Improvements (continued)

SedonaSchedule

Parts Reconcile Will Issue Column

A new column entitled “Will Issue” is now displayed on the Parts Reconcile view of a Ticket. This column will record the quantity of each part for which a checkmark has been placed in the Stock checkbox indicating that it should be issued from the specified warehouse upon either invoicing or the close of the ticket. Parts that do not have a checkmark in the Stock checkbox, and which have not been issued to the Ticket, will still appear in red in the balance column.





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Application Enhancements/Improvements (continued)

Auto Refresh On/Off

The icons for Auto Refresh now have a visual indicator as to whether the Auto Refresh is currently on or off. An “x” will appear through the icon that is not currently selected. In the example below, Auto Refresh is currently turned on. When logging out of SedonaSchedule and logging back in, the application will remember the User’s last Auto Refresh selection.

SedonaServer Information

User login passwords are now encrypted at the database level.

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Application Enhancements/Improvements (continued)

Application Corrections

Accounts Payable

Documents

Reported Issue: Documents could not be added to a Vendor where the Vendor Name was longer than 50 characters. This has been corrected.

Purchase Orders

Reported Issue: The Drop Ship button was not being displayed when the Direct Expense checkbox was selected and the Purchase Order was linked to a Job or Ticket. This has been corrected.

Accounts Receivable

EFT Pending Amount

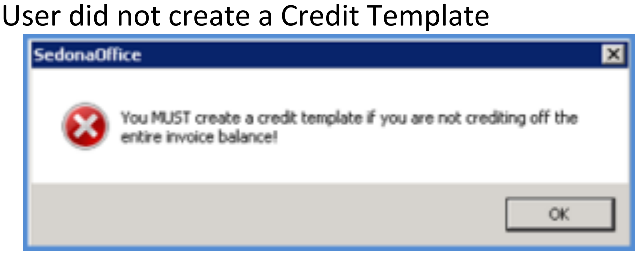
Reported Issue: When an invoice has been declined multiple times for payment, the cumulative amount of the declined transactions was being displayed at bottom of the invoice in red as the EFT Pending Amount; this has been corrected.

Credit Requests

Reported Issue: When a Ticket was credited off due to a sales tax correction, the new invoice did not correctly replicate the Invoice Items from the original invoice; this has been corrected.

Reported Issue: If a Credit Request was created under the conditions below, an error message was presented to the User and would cause the Credit Request to be locked-up. Now a message will be displayed alerting the User they must first create a Credit Template.

- The Invoice has been partially paid
- The requested amount entered is less than the balance of the Invoice
- The User did not create a Credit Template



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Application Corrections (continued)

Client Management

Cancelling a Rate Change from the Customer Explorer

Reported Issue: When a recurring line had been rate increased, was invoiced for the new rate, and subsequently had their new rate change cancelled, the next billing cycle on the Recurring Line reverted back to the last time the previous Recurring Line had been cycled instead of advancing the customer to the next cycle based on the last invoice. This has been corrected.

Customer Numbers

Reported Issue: Creation of a customer number exceeding 10 digits or attempting to change the customer number of an existing customer caused an overflow error message. This has been corrected.

Customer Bill To

Reported Issue: Customers that did not have the state spelled in full on the Bill To address record could not be edited without receiving a “94 Invalid Use of Null” error message.

Documents

Reported Issue: Documents could not be uploaded to a customer whose name was more than 50 characters. This has been corrected.

Application Corrections (continued)

Inventory

Documents

Reported Issue: When a Part Code description was greater than 50 characters, a document could not be added to the part. This has been corrected.

Parts Journal

Reported Issue: The Part Journal was not displaying information entered into both the memo and reference fields from a transfer transaction. This has been corrected.

Transfers

Reported Issue: The Receive Transfer Form was not displaying both reference and memo columns. This has been corrected.

Reported issue: Transfer requests that resulted in a negative quantity in the From Warehouse were not being refused. This has been corrected.

Reported Issue: When there was a quantity of 32,000 or of the same part within a warehouse, transferring the part caused an overflow message to appear. This has been corrected.

Application Corrections (continued)

Job Management

Commissions

Reported Issue: When gross commission was split 50/50 between two salespersons, the commission calculated for each salesperson was calculated on 100% of the gross margin of the Job instead of 50%. This has been corrected.

Tasks

Reported Issue: Clicking on an approved Job Task that had already been Invoiced then clicking on the Save button would cause the task to become unapproved and the invoice number to not display next to the invoice task. This has been corrected.

Application Corrections (continued)

SedonaSchedule

Creation of Service Ticket

Reported Issue: When creating a Ticket at the Site or Systems level within the Customer Explorer, the user was prompted to select site and system when more than one Site or System existed within the customer structure.

Comments Field

Reported Issue: When creating a Ticket from the Customer Explorer where the User's group did not allow editing of the ticket Comments field, the Comments field was grayed-out and the User was unable to enter the initial Comment. This has been corrected.

Documents

Reported Issue: When creating a Purchase Order and pressing the Apply button, the documents tab was not being enabled to scan in or attach a document. This has been corrected.

Schedule Board Monthly View

Reported Issue: When viewing the Schedule Board with the Month View, double-clicking on an appointment would not open the Ticket. This has been corrected.

Printed Service Tickets

Reported Issue: The total amount of the service ticket was only displaying in the subtotal field of the charges block on the printed ticket. The total now appears in both the subtotal and totals fields of the charges block.

Service Fee

Reported Issue: Removing the checkmark from the service fee box did not indicate that $0.00 was being charged to the ticket. This has been corrected.

Miscellaneous Appointments

Reported Issue: When viewing the list of Miscellaneous Appointments, double-clicking on a group would cause an error. This has been corrected.

Application Corrections (continued)

Reports

Transfer Report

Reported Issue: Generating the Transfer Report from Report Manager would display a Run-time error. This has been corrected.

SedonaSetup

User Groups

Reported Issue: On the Application Access tab of the User Group setup, the Header Name for SedonaSetup was being displayed at the bottom of the group. The SedonaSetup header now displays at the top of the group.

WeSuite

WeEstimate

Reported Issue: Imported jobs had salesman missing or the incorrect one listed. This has been corrected.

Manitou Integration

Reported Issue: The auto login feature from Manitou to SedonaOffice was producing an authentication error message. This has been corrected.