SedonaOffice

The #1 Financial Software for Security Companies

SedonaOffice Release Notice

SedonaOffice

Version 5.6.228

Last Updated: 22-September-2014

SedonaOffice

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About this Document

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Overview

This document is being provided to explain the changes made to the SedonaOffice application since Version 5.6.224. This is an intermediate version update that contains new features and application corrections.

Table of Contents

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Application Enhancements/Improvements

Accounts Payable

Purchase Orders for Job Parts

When creating a Purchase Order for a Job directly from the Accounts Payable menu option, the application will now bring in the remaining parts for the selected Job where the current Vendor is the Primary Vendor. This behaves the same way as creating a Purchase Order directly from within the Job itself.

Application Enhancements/Improvements (continued)

Client Management

Contact Web Login

If a Contact is setup for SedonaWeb on the *Web Login* tab of the contact record, the application will now display the date and time of the last time the Contact logged into their account.
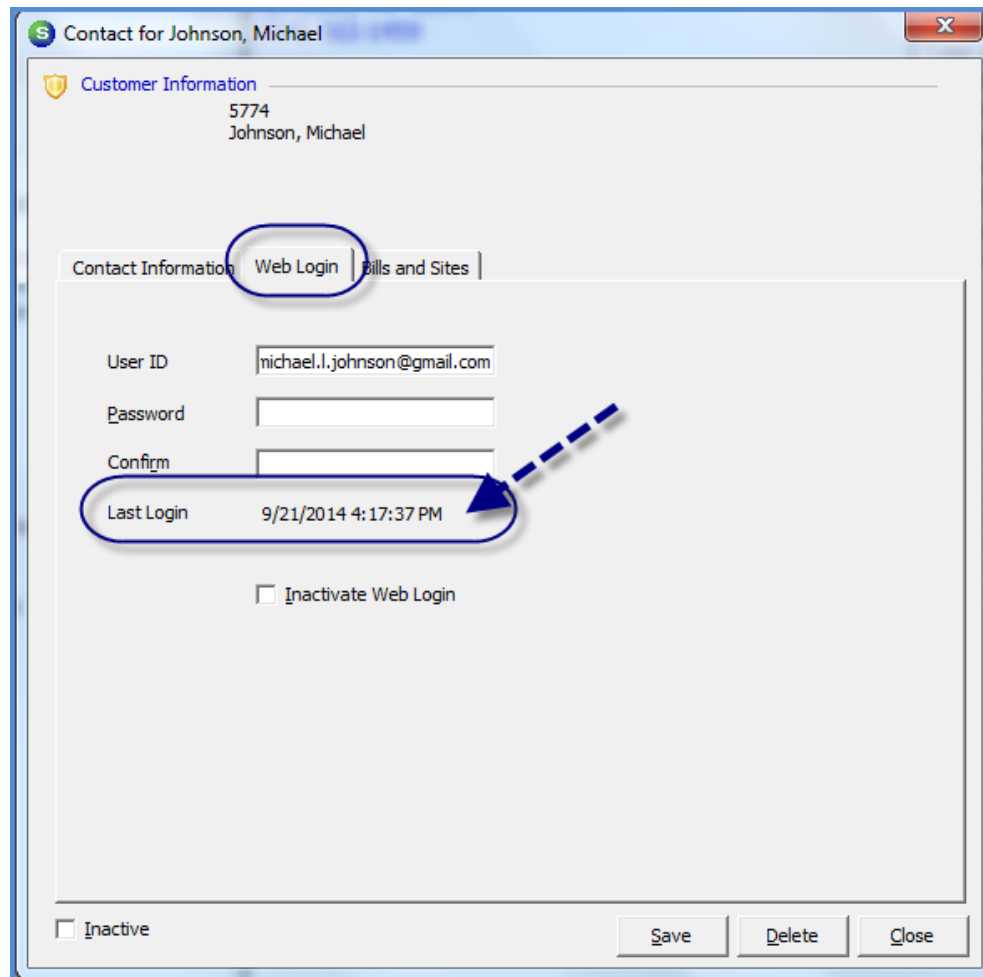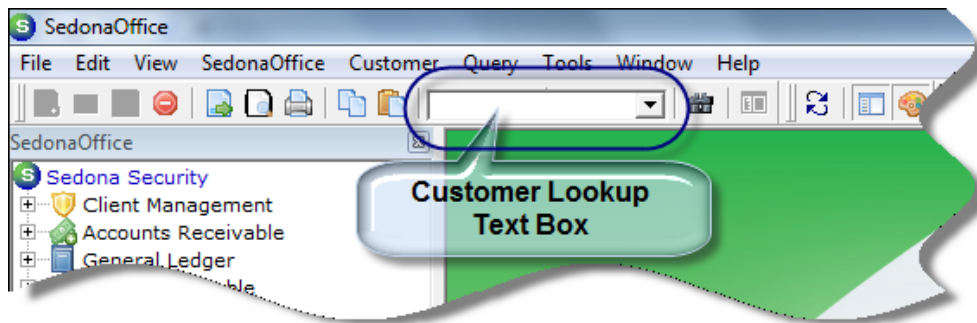
Application Enhancements/Improvements (continued)

Client Management (continued)

Customer Lookup – Text Box

When searching for a customer using the *Text Box* lookup, if more than one customer or site was found matching the text entered, the [Choose Customer] list displayed will now contain the Site Name field for ease in selecting the correct customer record.

Application Enhancements/Improvements (continued)

## Client Management (continued)

Company Rate Change

A change was made to the program where "future" recurring lines will no longer be included in the selection process. Future recurring lines are those that will invoice for the first time in an accounting period beyond the current accounting period.

Application Enhancements/Improvements (continued)

SedonaSchedule

Billing Form – Tax Display

A change was made to the display of calculated tax on the Ticket *Billing* form where an Invoice has already been created. Instead of showing the break-down of taxes in columns to the right of each item type, a new button, *View Tax Summary*, is located to the right of the total tax on the Sub Total line. When clicking on this new "*View Tax Summary*" button, a listing of the posted tax will be displayed. This change was made due to performance issues experience by several SedonaOffice customers.
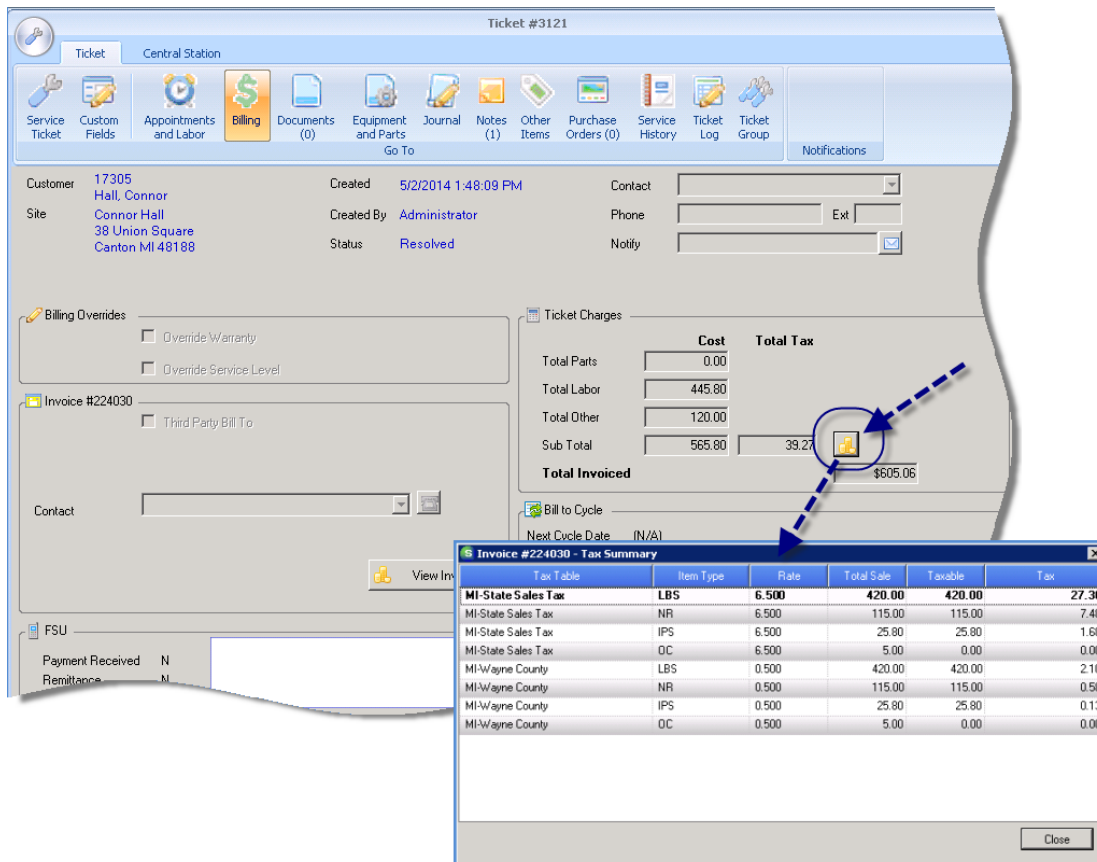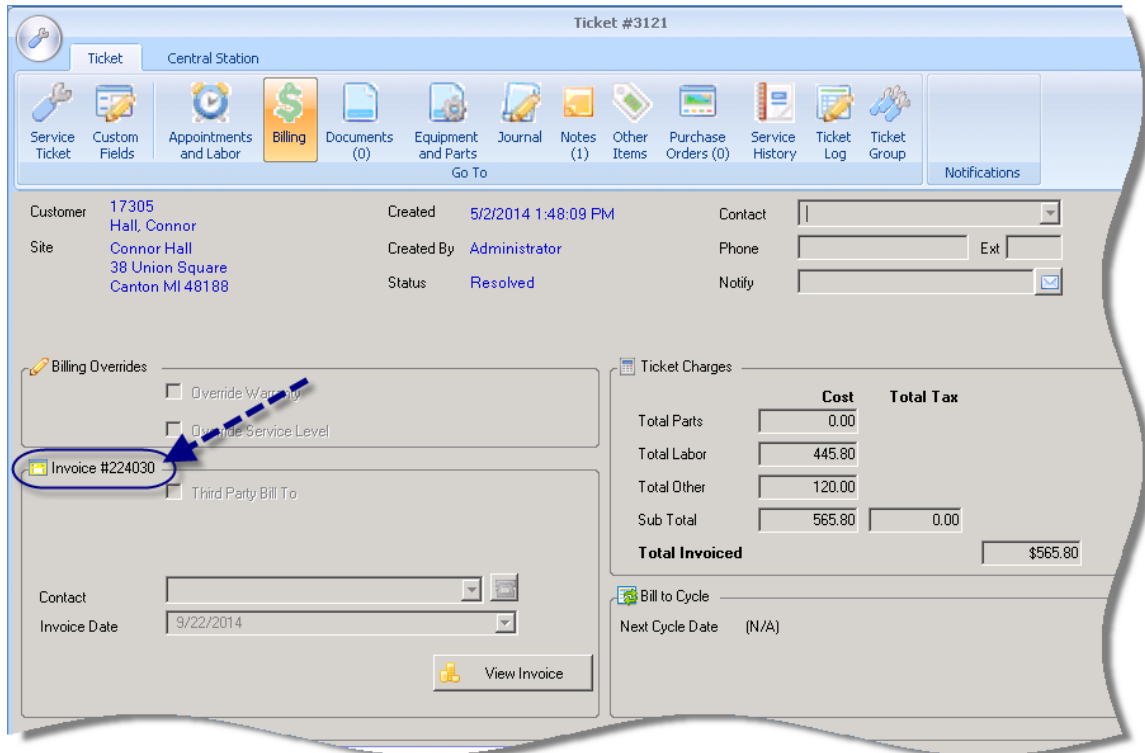
Application Enhancements/Improvements (continued)

SedonaSchedule (continued)

Billing Form – Invoice Number Display

If an Invoice was created for a Ticket, the posted *Invoice Number* is now displayed on the left side of the Billing form as shown in the screen shot below.

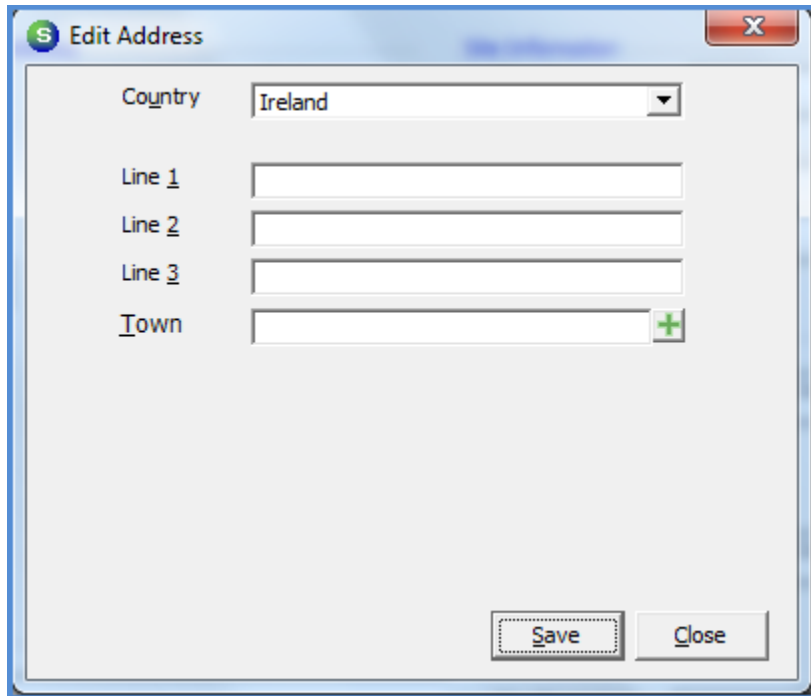*Application Enhancements/Improvements (continued)*

SedonaSetup

Geographic Setup - Countries

Ireland has been added as a standard country into the Country setup table. The address format for this county is displayed in the screen shot below.

Application Enhancements/Improvements (continued)

Report Manager

Closed Service Ticket Cost*

Closed Service Ticket Cost - Not Invoiced*

Open Service Ticket Cost*

The above listed reports now contain an option to print the Ticket Resolution Note. When selecting the Summary Only or Single Line Detail option, the Resolution Note option is not available. This feature was introduced with 5.6.223.

Closed Service Ticket Cost* - Report Options Form

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Application Enhancements/Improvements (continued)

Closed Service Ticket Cost – Not Invoiced* - Report Options Form

Open Service Ticket Cost* - Report Options Form

Application Corrections

Accounts Payable

Part Receipts

Reported Issue: Users were unable to print a Part Receipt if the receipt contained more than one part or expense item. This has been corrected.

Vendor Documents

Reported Issue: If the name of the Vendor was longer than 50 characters, the application was not allowing a User to add documents to the Vendor. This issue has been corrected.

Vendor Bills & Write Checks

Reported Issue: If Categories are required to be entered, the application was forcing the User to select a Category for Balance Sheet type G/L Accounts on the Expense tab. The application will now only require a Category be selected for non-balance sheet accounts for Bills and Checks.

Purchase Order Expense Type

Reported Issue: If a Vendor is setup with specific G/L Accounts and Expense Types, the application was not auto-filling the Expense Type from the Vendor setup when the Purchase Order was for a Job and the Job Type setup contained the G/L Account on the Accounts setup. The application will now load the correct Expense Type of the G/L Account assigned to the Vendor.

Application Corrections (continued)

Client Management

Contacts – Web Login

Reported Issue: Contact which were setup for SedonaWeb encountered problems when attempting to change their password; this was due to the new password encryption introduced in 5.6.224. This issue has been corrected.

Company Rate Change

Reported Issue: The Company Rate Change program was not displaying any customers within the Customer [list] regardless of the parameters selected for the batch. This problem was introduced in 5.6.223 and has been corrected.

Application Corrections (continued)

Inventory

Transfer Requests

Reported Issue: After creating a Transfer Request with max/min parts, the form was not allowing the user to change a requested transfer quantity; an error message was being displayed. This issue has been corrected.

Part Documents

Reported Issue: If the Part Code [part number] was longer than 50 characters, the application was not allowing a User to add documents to the Part. This issue has been corrected.

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Application Corrections (continued)

Job Management

Job Creation from a QuoteWerks Quote

Reported Issue: There was a problem creating a new Job when the Job was for an existing Customer and Site. This issue has been corrected.

Job Documents

Reported Issue: If the name of the Company was longer than 50 characters, the application was not allowing a User to add documents to a Job. This issue has been corrected.

Application Corrections (continued)

SedonaSchedule

Bill Ticket to Cycle

Reported Issue: When using the Bill Ticket to Cycle option a User was not allowed to bill a cycle where the Next Cycle Date occurs in the past. This correction was made to accommodate customers that need to be billed in arrears. This issue has been corrected.

Bill Ticket to Cycle

Reported Issue: When creating a Purchase Order for a Service Provider, the Parts tab was not available to list parts being purchased. This issue has been corrected.