



SedonaOffice Release Notice

SedonaOffice

Version 5.6.228

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549 East Washington Avenue
Chagrin Falls, OH 44022

SedonaOffice

440.247.5602

45185 Joy Road
Canton, MI 48187

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

ABOUT THIS DOCUMENT 2

OVERVIEW 2

APPLICATION ENHANCEMENTS/IMPROVEMENTS 4

Accounts Payable 4

Client Management 5

SedonaSchedule 8

SedonaSetup 10

Report Manager 11

APPLICATION CORRECTIONS 13

Accounts Payable 13

Client Management 14

Inventory 15

Job Management 16

SedonaSchedule 17

Application Enhancements/Improvements

Accounts Payable

Purchase Orders for Job Parts

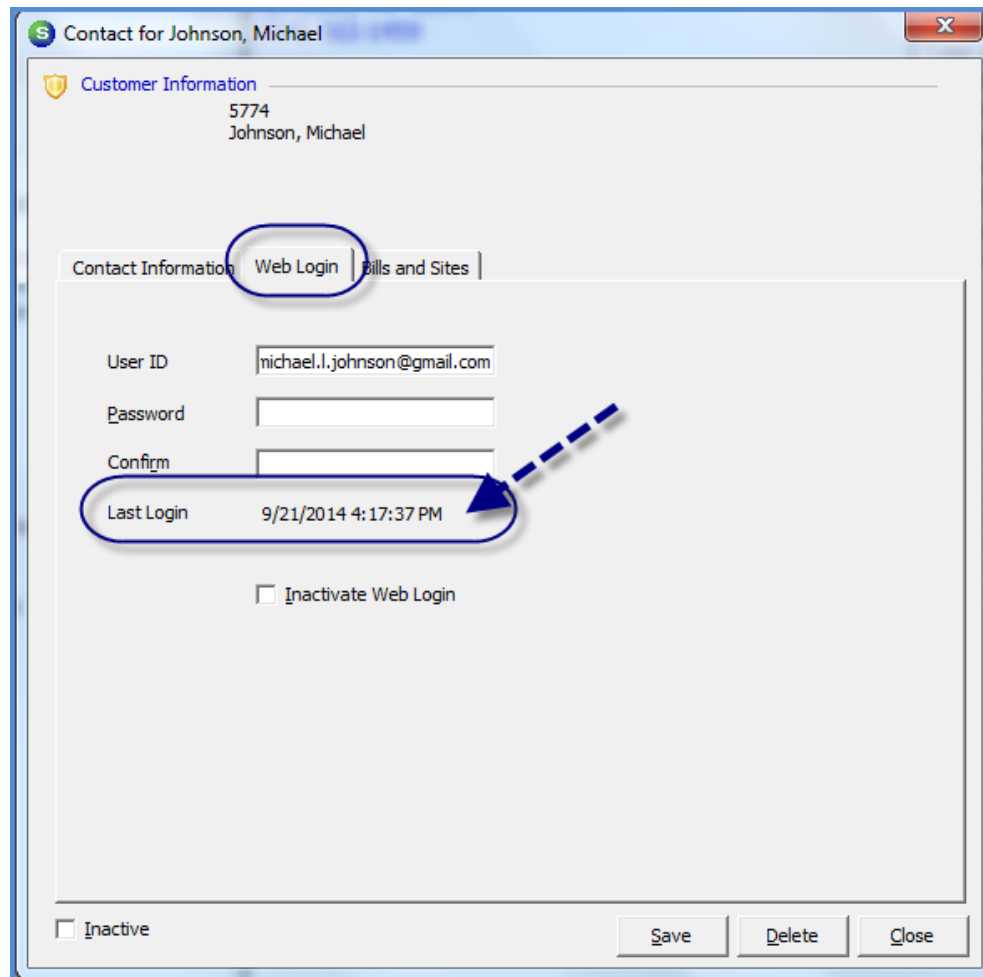
When creating a Purchase Order for a Job directly from the Accounts Payable menu option, the application will now bring in the remaining parts for the selected Job where the current Vendor is the Primary Vendor. This behaves the same way as creating a Purchase Order directly from within the Job itself.

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.

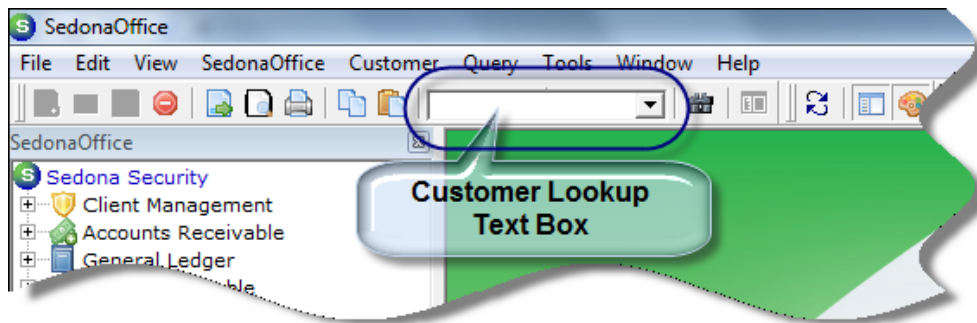


Application Enhancements/Improvements (continued)

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.



Customer Number	Name	Site Name	Site Address	Site City	Status
10191	Johnson Group Of Co. Inc	Johnson Group Of Co. Inc	297 Grand River Ave	Detroit	ANR
11012	Larsen St John & Johnson	Larsen St John & Johnson	1 West Main Street	Lansing	ANR
11530-21	Johnson Charter School	Johnson Charter School	95 Johnsons Boulevard	Cleveland	ANR
11530-22	Johnson Charter School-Library	Johnson Charter School-Library	95 Johnsons Boulevard	Cleveland	AR
11842-2	Rebecca Johnson School	Rebecca Johnson School	55 Catherine Street	Plymouth	ANR
12441	Johnson, Chasity	Johnson, Chasity	9 Stone Hill Rd	Solon	ANR
13524	Johnson, Gino	Johnson, Gino	16 Johns Path	Novi	AR
13797	W.W. Johnson Life Center	W.W. Johnson Life Center	736 State Street	Detroit	ANR
14057	Johnson, Lacey	Farmer, Mildred	81 Cumberland St	Cleveland	ANR
14560	Johnson, Erin	Johnson, Erin	371 West Preston St	Cleveland	ANR
14573	Johnson, Clayton	Johnson, Clayton	25 Terrys Plain Rd	Chagrin Falls	ANR
14934-63	Rosalie Johnson	Rosalie Johnson	780F Farmington Ave	Solon	ANR
151	Johnson Photography	Johnson Photography	18 Main Street	Plymouth	AR
15655	Johnson, Anita	Johnson, Anita	71 Waterside Ln	Chagrin Falls	ANR
16108	Belva Johnson	Belva Johnson	82 Pershing Street	Detroit	ANR
165	Johnson, Sammy	Johnson, Sammy	1000 Main Street	Fresno	ANR
16559	Johnson, Ivy	Johnson, Ivy	111 Johnson Lane	Solon	ANR
16730	Johnson, Corey	Forrester, Hanna	115 Montclair Dr.	Novi	ANR
16987-265	Mary Johnson	Mary Johnson	46 Hudson Street	Novi	AR
17123	Johnson Garden Service	Johnson Garden Service	398 Chamberlain Highway	Lansing	ANR
17292	Johnson, Linda	Johnson, Linda	304 West Main Street	Plymouth	ANR
18774	Atlantic Johnson Inc.	Atlantic Johnson Inc.	87 Sharon Road	Plymouth	ANR
19491	Johnson, Kaleb	Johnson, Kaleb	71 Woodford Hills Drive	Plymouth	ANR
19532	Carllyle Johnson Machine	Carllyle Johnson Machine	18 Pine Tree Lane	Cleveland	ANR
19836	Johnson, Brennan	Johnson, Brennan	403 Manchester Road	Cleveland	ANR
19914	Johnson, Marcel	Johnson, Marcel	150 Berle Road	Novi	ANR
19968	Howard Johnsons	Howard Johnson's # 236	7 Weston Street	Detroit	ANR
20471	Johnsons Fish Market	East Side Fish Market	218 Capen Street	Detroit	ANR
20918	Johnson, Clayton	Johnson, Clayton	107 Steele Rd	Novi	ANR
210	Johnson, Sammy	Johnson, Sammy	129 Starkweather Drive	Plymouth	AR
2106-125	Mary I Johnson School	Mary I Johnson School	286 Whittemore Road	Canton	ANR

Application Enhancements/Improvements (continued)

Client Management (continued)

Company Rate Change

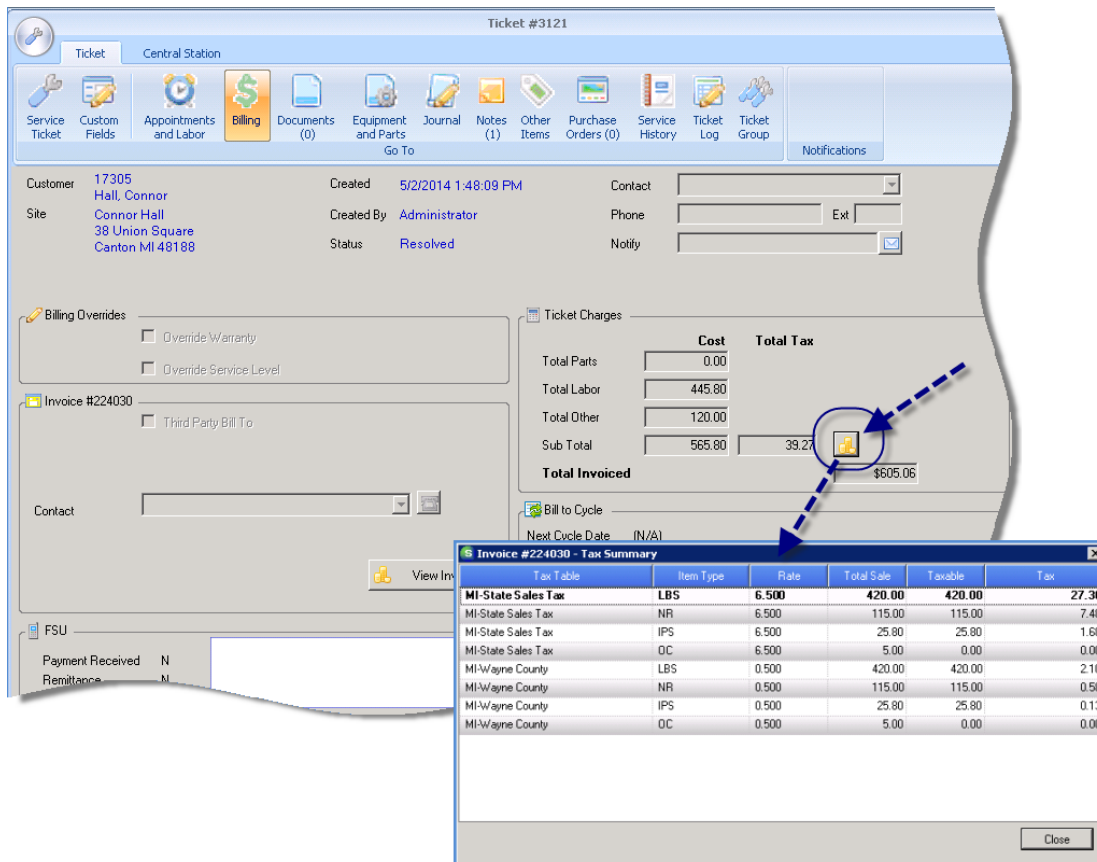
A change was made to the program where “future” recurring lines will no longer be included in the selection process. Future recurring lines are those that will invoice for the first time in an accounting period beyond the current accounting period.

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.

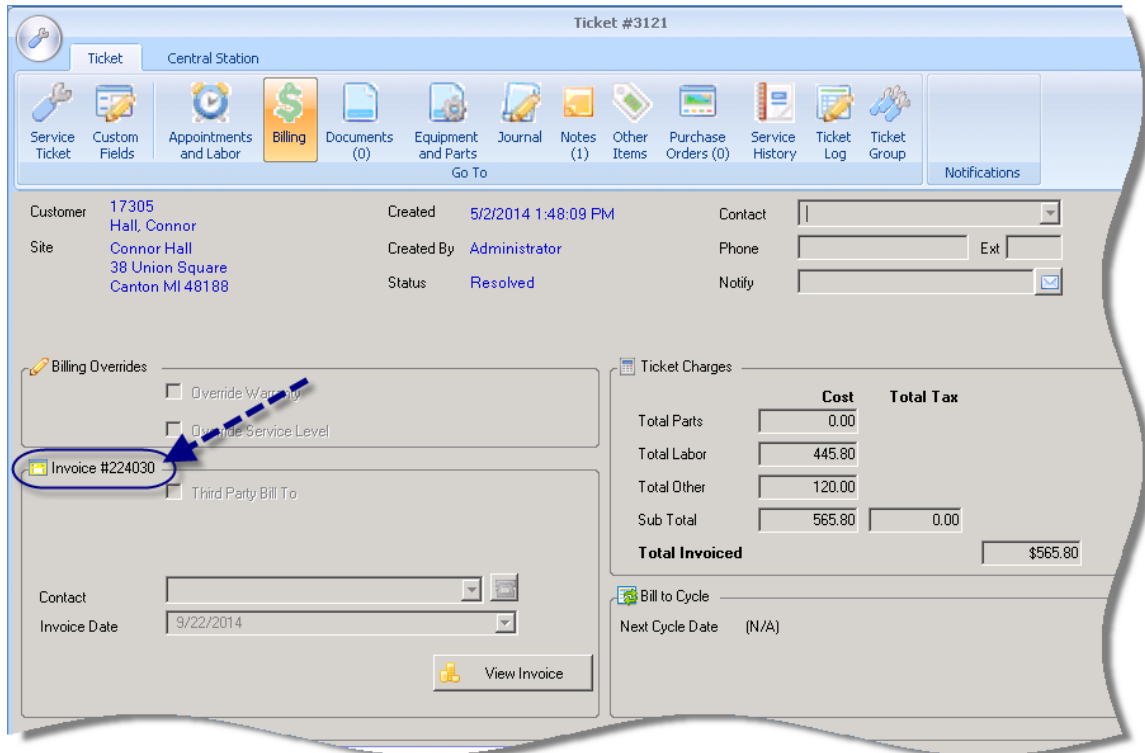


Application Enhancements/Improvements (continued)

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.

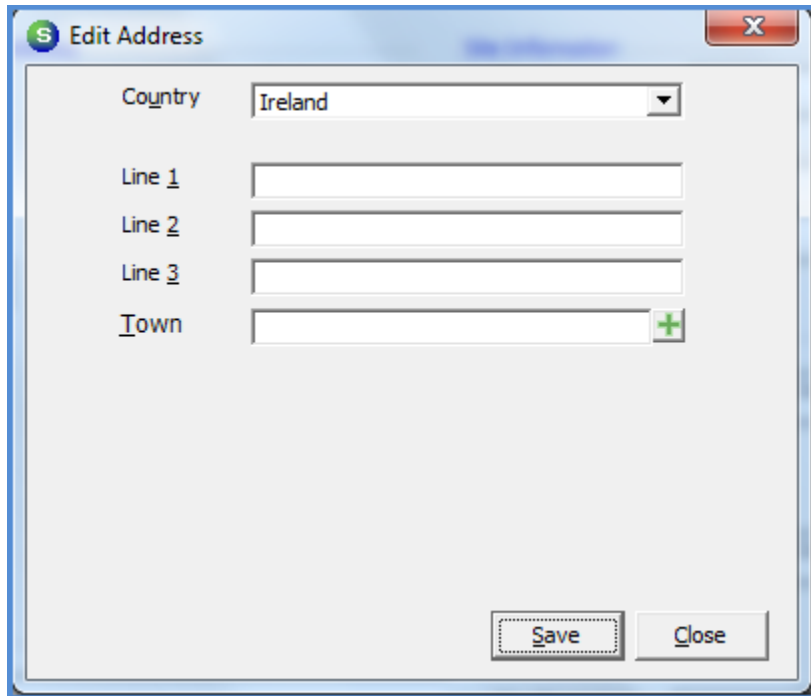


Application Enhancements/Improvements (continued)

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

The screenshot shows the 'Service Ticket Closed' report options form. The form is divided into several sections: General, Options, Branches, Technicians, Service Companies, Routes, and Service Levels. The 'Print Resolution Note' checkbox is highlighted with a blue circle and a blue arrow pointing to it. The 'Print Resolution Note' checkbox is currently unchecked. The 'Single Line Detail' checkbox is also unchecked. The 'Summary Only' checkbox is checked. The 'Show all of the above' radio button is selected in the 'Options' section. The 'Hide Inactive' checkboxes are checked for all sections. The 'Export', 'Ok', and 'Cancel' buttons are at the bottom right.

Application Enhancements/Improvements (continued)

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

The screenshot shows the 'Service Ticket Closed Not Billed' report options form. The 'Options' section contains several radio buttons for filtering tickets: 'Show only Service Tickets' (selected), 'Show only Vendor Service Tickets', 'Show only Inspection Tickets', 'Show only Vendor Inspection Tickets', and 'Show all of the above'. A dashed blue arrow points to the 'Print Resolution Note' checkbox, which is circled in blue. Other sections include 'General' with date ranges, 'Group By' and 'Sort By' dropdowns, 'Branches' with a list of CA, MI, MI2, and OH, 'Technicians' with a list of names, 'Service Companies' with a list of company names, 'Routes' with 01 and 03, and 'Service Levels' with a list of service level names. Buttons for 'Info', 'Export', 'Ok', and 'Cancel' are at the bottom.

Open Service Ticket Cost* - Report Options Form

The screenshot shows the 'Service Ticket WIP' report options form. The 'Options' section contains several radio buttons for filtering tickets: 'All Tickets Open As Of' (selected), 'Show only Service Tickets', 'Show only Vendor Service Tickets', 'Show only Inspection Tickets', 'Show only Vendor Inspection Tickets', and 'Show all of the above'. A dashed blue arrow points to the 'Print Resolution Note' checkbox, which is circled in blue. Other sections include 'Ticket Status' with a date field, 'Group By' and 'Sort By' dropdowns, 'Branches' with a list of CA, MI, MI2, and OH, 'Technicians' with a list of names, 'Service Companies' with a list of company names, 'Routes' with 01 and 03, and 'Service Levels' with a list of service level names. Buttons for 'Info', 'Ok', and 'Cancel' are at the bottom.

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.

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.