

# **Release Notice**

## Version 5.7.24

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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 enhancements and corrections made in the release and is to be used for reference purposes only.

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### Overview

This document is being provided to explain the changes made to the SedonaOffice application since Version 5.7.18. This is an intermediate version update that contains new features and application corrections.

### Revision

This document was revised on February 6, 2017 to clarify that the use of Custom Job Costing Buckets will directly affect the totals seen on all job costing reports within Report Manager. The amounts in these buckets will <u>not</u> be included in any of the job costing reports.



### **Application Enhancements/Improvements**

### **Accounts Payable**

#### **ADI Integration**

The application now prevents the creation of a bill from downloaded data where the invoice number already exists in SedonaOffice.

### **Accounts Receivable**

#### **Payment Options**

When a new credit card is added to Payment Options on a customer's account, the validity of the number as an actual credit card number will be checked and the Type field will auto populate based on the credit card number entered.

S EFT Setup 388 Wag	ging Tails Pet Spa		×
Customer Number: 388 Wagging Tails Pet Spa Waggin Tales Pet Spa 458 Canton Center Road Canton, MI 48187 (734) 948-1212			
S Customer Banks		Credit Cards	
Banks <u>O</u> n File		C <u>a</u> rds On File	<new cc=""></new>
<u>B</u> ank		Name on Card *	Rachel Carlson
Name on Account * (Not Business Name)		Card Number *	4423567895002
Account Number*	Edit	Туре	VISA
	Checking	Expiration *	12 / 17
	C Savings	Bill Street Address	458 Canton Center Road
		Bill <u>P</u> ostal Code	48187
Payment Method		Payment Method	Visa
Auto Processing	Recurring Non-Recurring	Auto Processing	Recurring Non-Recurring
Hold Day		Hold Day	1 💌
Days Past Inv Date	0	Days Past Inv Date	0
		Print Cycle Invoi	ices
Auto Bill To Recurring		Auto Bill To Recurring	Waggin Tales Pet Spa
	<u>Apply</u> <u>Delete</u>		Apply Delete
New Transaction			Glose



### **Print Invoices**

The Print Invoices screen has been updated to include a new button "Subaccounts of..."

Select Invoices		×
Branch	Dates	Customer Group
<ul> <li>Ace Security Systems</li> <li>Americas Best</li> <li>Andrea Security Company</li> <li>Belgium</li> <li>Boss Systems</li> <li>Dons Test Branch</li> <li>✓ MI</li> </ul>	From Thru	
Hide Inactive Branches	From	Hide Inactive Customer Groups
Select All Invert Selection	Thru	Select All Invert Selection
Invoice Type	Type of Customer	Filter Options
IZ Cycle IZ Job IZ Service IZ Other	Church Commercial Education Residential Restaurant Retail	<ul> <li>Show Master Cycle Invoices</li> <li>Only Show Invoices in Print Queue</li> <li>Show ACH Pending Invoices</li> <li>Show BFIS Pending Invoices</li> </ul>
Bill-to Type	Hide Inactive Branches     Select All Invert Selection	☐ Hide Invoices with \$0 Balance Due ☐ Filter for Emailing
Residential		Customer Number
Export List Print Setup	Subaccounts of	Create List Cancel

This button will enable a list to appear of all open invoice which meet the criteria chosen that are being billed directly to the subaccounts of the specific master account(s) chosen.

Sub-accounts of	
Master Accounts	
10024	
10248	
1025	
10968	
11076	
11158	-
Select All	Invert Selection
	<u>O</u> k <u>C</u> ancel

### **Client Management**

### **Customer Equipment List**

When parts are added to the customer's equipment list after the close of a job, the equipment edit form on each part will show the manufacturer's warranty end date based on the term of the warranty as defined on the part's detail screen and the start date of the warranty as of the close of the job.

🖻 Equipment Edit 388	×
Ustomer Information Site System	Wagging Tails Pet Spa 458 Canton Center Road 388 Fire
Equipment Detail Insta	all and Removal
<u>P</u> art Code	016105X32D
	UNIVERSAL DOOR STRIKE 12 VAC/DC
Quantity	1
Price	\$0.00
Location	
Local <u>Z</u> one	
<u>S</u> erial Number	
Lot Number	
Manuf <u>W</u> arranty	Six Month
Warrant <u>y</u> Start	10/2/2015
Manuf Exp Date	4/2/2016
Other Warranty	
	Covered By Contract
	Save Close

### Jobs

### **Current On-Hand Quantities – CTRL-Q**

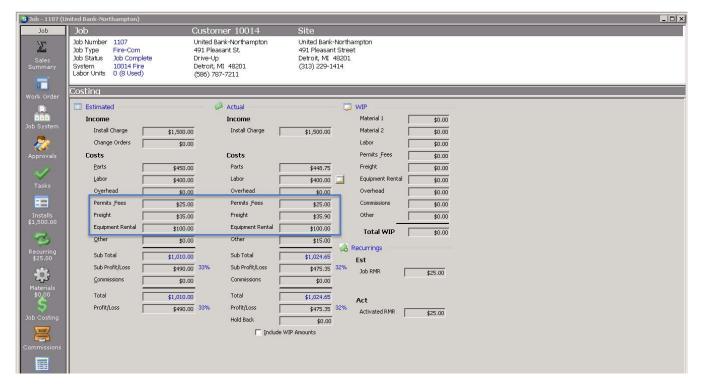
A new feature has been added where the user can place the cursor on the name of a part within a purchase order and press CTRL+Q. The on-hand quantity for the part in all warehouses will be displayed.

S New Purchase Order Vendor Tri-Ed	Category Jobs Com			_	_	_		Print Now
Purchase Order Tri-Ed P.O. 80x 402433 Atlanta, Georgia 30384 Phone: (300) 366-4472 Fax: Ship To: 547 Washington Chagrin Falls, OH 44022	Parts Due Date	Branch OH Order Date 9/28/2015 Ship Method Job Number 1083 Rachel Ambrose Parts Allowed	Warehouse Main-OH TIME Acknowledged					
			Parts List					
Part	Description 232FX STAND ALONE ACCESS HEAVY DUTY EXIT BUTTON W/DELAY	Vendor Part 232FX LC-621GREXDP	Pkg Qty 1 1	Quantity 1 1	Cost 200.00 72.38	Amount 200.00 72.38	Rcvd         Std Cost           246.67         72.38	
	S Current On Hand - 232FX Warehouse Marehouse MareoH	On Hand On	Order Committed 13 4 0 0		×			×
Memo							Total Cost Received Cost Apply	\$272.38 \$0.00 K <u>C</u> ancel
Quotes				Close				



#### **Custom Job Costing Buckets**

Prior to this version, the job costing buckets had been predefined as Material 1, Material 2, Labor, Overhead, Commissions, and Other. With this release, users may define the names of up to 3 custom job buckets which fall into the expense type of "Other" (e.g. Permits, Freight, Equipment Rental, etc.). Expenses that do not fall into these groupings will still show in the job expense type of "Other" on the job costing screen.



The new buckets will be visible on the job costing section of a job ticket only. **Their contents will not be included in any of the job costing reports with Reports Manager**. Customers who elect to use this feature will find that their job costing reports do not reflect what is being displayed on the screen as the contents of the custom buckets do not carry over to any of the job costing reports.



### Setting Up the Custom Job Costing Buckets

Navigate to the Setup Processing table for JM in the SedonaOffice Setup tables. A new tab has been added entitled "Custom Job Costing Buckets." Define the three custom job buckets. If WIP will be used, place a checkmark in the box and define the General Ledger Numbers for WIP that should represent each bucket.

Sedona Setup		Jala Deservatione			
Description	Area	Job Processing			
Warranty Types	SV	 Setup Processing Custom Job	Costing Buckets		
Warehouses	IN				
Vendors	AP				
Vendor Types	AP	Custom Bucket 1			
Users	OP	Description	Permits & Fees		
User Groups	OP	+	permis a rees		
User Defined Table4	SM				
User Defined Table3	SM		I Use <u>W</u> IP		
User Defined Table2	SM	WIPAccount	122130	311	
User Defined Table1	SM		1		
User Defined Setup	SM				
UL Grade	CS				
Type Of Customer	СМ				
Transmission Format	cs	Custom Bucket 2			
Terms	AP	Description	Freight		
Terms	AR		I roight		
Technicians	sv		Vse WIP		
Tax Tables	AR		I♥ Use <u>w</u> iP		
Tax Groups	AR	WIPAccount	100600	E L	
Tax Agency	AP		-		
System Types	СМ				
Status	SM				
Statement Rules	AR				
Signal Types	CS	Custom Bucket 3			
Shipping Methods	AP	Description	Equipment Rental		
Setup Processing	AP	2000, 2001	Equipment Rental		
Setup Processing	AR				
Setup Processing	JM		I Use <u>W</u> IP		
Setup Defaults	sv	WIPAccount	122140	31	
Service Ticket Message	sv		1		
Service Levels	sv				
Service Companies	sv				
Sedona Modules	OP				
Scheduling and Appointments	sv				
Sales Resolution Codes	SM				Apply
Sales Managers	SM				



### Defining the New Job Expense Types

New job expense types must be defined for use with these buckets. The first expense type to appear on the job costing screen must be assigned the number "1" in the Custom JC Bucket field. The second will be given number "2" and the last number "3." All other job expense types will retain the number "0" and will continue to appear in the bucket entitled "Other."

🖻 Sedona Office Setup (SedonaSecurit	y)			
File Find Find Next View Tools Help				
Sedona Setup			Expense Types	
Description	Area		Typerise Types	
User Defined Table3	SM			
User Defined Table4	SM			
Earnings Type	PR		Expense Types	
Payroll Setup	PR			
Sedona Modules	OP		Expense Type Description Use WIP	Custom JC Bucket
Alarm Companies	OP		L Labor N	0
Central Station Tracking Defaults	OP		M Material N C Commission N	0
Company Edit	OP		V Overhead N	ő
Default Vendor	OP		O Other N	0
Departments	OP		TX Tax N	0
Document Type	OP		OW Other WIP Y	0
Employees	OP		AO Miscellaneous Expense Y S Subcontractor Y	0
Geographic Tables	OP		ER Equipment Rentals Y	3
Integration Setup	OP		P Permits & Fees Y	1
Note Type	OP		F Freight Y	2
Printer Setup	OP		T Travel Y	0
User Groups	OP		E Engineering/Drafting Y	0
Users	OP			
Commission Types	JM			
Contract Forms	JM			
Custom Fields Setup (Job)	JM			
Custom Fields Table1 (Job)	JM		1	
Custom Fields Table2 (Job)	JM			
Custom Fields Table2 (Job) Custom Fields Table3 (Job)	JM		🗉 Expense Type Edit	
Custom Fields Tables (Job) Custom Fields Table4 (Job)	JM			
Install Companies	JM		Expense Type P	
Install Companies Installers				
	JM		Description Permits & Fees	
Job Approval Group	MC			
Job Expense Types	JM		Use WIP 🔽	
Job Phases	ML			
Job Statuses	JM		Custom JC Bucket 1	
Job Tasks	MC			
Job Types	ЗM			
Labor Tasks	ЭМ			
Prevailing Wages	ЭМ		Ap	oly <u>N</u> ew <u>D</u> elete
Setup Processing	JM	-		

### Assigning the new Expense Codes to GL Numbers on AP Vendors

Job costing expense types are directly associated with the general ledger numbers on the vendor records. To have these new expense types come in correctly onto new bills, it may be necessary to update the job expense types on vendor records. In the example below, GL 510006 has been modified to show the job expense type of "ER" for Equipment Rental instead of "O" for "Other":

S Vendor Bentley	Construction Company Edit			×
⊻endor Code	Bentley Construction Company	Category	Jobs Res	▼
Vendor Type	Sub Contractor	-	Open Bills	400.00
Branch	ОН	•	Open Credit	0.00
			Net Due to Vendor	400.00
Vend <u>o</u> r Bills Cre	edi <u>t</u> s Pay <u>m</u> ents PO's <u>R</u> eceipts <u>R</u> eturn	ns GL Journal GL Acco	ounts Barts Custom Fields	Notes
Account	Description		Default Amount   Expens	e Type
510006 520006	COS - Jobs-Equipment Rental COS - Service-Equipment Rental		\$100.00 ER \$200.00 ER	
Account	510006	Expense Type	2	
Description	COS - Jobs-Equipment Rental		-	
Default Amour			Add/Update Dele	te New
Inactive	Secure Vendor			Save Close



#### **Purchase Orders**

It is now possible to create a purchase order for subcontract labor within a job. When selecting this option, a blank purchase order will appear where a specific vendor may be chosen for the services required.

	Alicia Hess)						_ 0 >
Job Labor	Job Job Number 1097	Customer 34000 Hess, Alicia	Site Alicia Hess				
Cost Details Journals	Job Type ACC-Res Job Status Prewire	4 Old Forge Road Unit 35	4 Old Forge Road Unit 30				
Tools	System 34000 Access Labor Units 0 (0 Used)	Canton, MI 48188 (734) 866-8506	Canton, MI 48188 (734) 866-8506				
	Purchase Orders						
	PO # Vendor	Amount Ordered	Due Back Ordered Full Rcpt				
Notes		Create Part PO Receive PO					
Invoicing		Create Labor PO Print PO					
8.2							
Issue Parts							
Journal Entry							
Purchase Orders							
Documents							
1							
Phases							
Part Reconcile							
S New Purchas	se Order	<i>a</i>					_ □ × Print Now
	Jobs Co	m					Direct Expense
Purchase (	Urder	PO <u>N</u> umber Branch					
		2175	ate Cknowledged				
Ship To:		2175 Tracking # Order Da [10/19/2	ate Acknowledged				
Ship To: Edit		2175 Tracking # Order Da 10/19/2 Ship Date Ship Met	ate Acknowledged				
		2175  Tracking # Order Da Tracking #  10/19/2 Ship Date Ship Met	ate Acknowledged				
Edit Drop Ship	anses Documents	2175 Corder Day Tracking # Order Day Intrinsion Ship Date Ship Mark Parts Duje Date 200 Num	ate Acknowledged				
Edit Drop Ship Parts Expe	enses Documents	2175 Order Da Tracting # Order Da Ship Date Ship Met Parts Due Date Job Num I 107 United B	ake Acknowledged 015 To Acknowledged hod y ber			Job Costing	
Edit Drop Ship		2175 Tracing # Order Du Tracing # Order Du Ship Date Ship Date Parts Due Date 20 Job Num United B	ste Acknowledged	Amount Category	30b	Job Costing Type	
Edit Drop Ship Parts Expe		2175 Order Da Tracting # Order Da Ship Date Ship Met Parts Due Date Job Num I 107 United B	ste Acknowledged	Amount Category	Job		
Edit Drop Ship Parts Expe		2175 Order Da Tracting # Order Da Ship Date Ship Met Parts Due Date Job Num I 107 United B	ste Acknowledged	Amount Category	Job		
Edit Drop Ship Parts Expe		2175 Order Da Tracting # Order Da Ship Date Ship Met Parts Due Date Job Num I 107 United B	ste Acknowledged	Amount	Job		
Edit Drop Ship Parts Expe		2175 Order Da Tracting # Order Da Ship Date Ship Met Parts Due Date Job Num I 107 United B	ste Acknowledged	Amount Category	Job		
Edit Drop Ship Parts Expe		2175 Order Da Tracting # Order Da Ship Date Ship Met Parts Due Date Job Num I 107 United B	ste Acknowledged	Amount Category	Job		
Edit Drop Ship Parts Expe		2175 Order Da Tracting # Order Da Ship Date Ship Met Parts Due Date Job Num I 107 United B	ste Acknowledged	Amount Category	Job		
Edit Drop Ship Parts Expe		2175 Order Da Tracting # Order Da Ship Date Ship Met Parts Due Date Job Num I 107 United B	ste Acknowledged	Amount Category	Job		
Edit Drop Ship Parts Expe		2175 Order Da Tracting # Order Da Ship Date Ship Met Parts Due Date Job Num I 107 United B	ste Acknowledged	Amounk Category	200		
Edit Drop Ship Parts Expe		2175 Order Da Tracting # Order Da Ship Date Ship Met Parts Due Date Job Num I 107 United B	ste Acknowledged	Amount Category	Job		
Edit Drop Ship Parts Expe		2175 Order Da Tracting # Order Da Ship Date Ship Met Parts Due Date Job Num I 107 United B	ste Acknowledged	Amount Category	Job		
Edit Drop Ship Parts Expe		2175 Corder Qu Tracking # Order Qu Ship Date Ship bat Parts Due Date Ship tet Information Ship Ship Ship Ship Ship Ship Ship Ship	ste Acknowledged	Amount Category	Job		
Edit Drop Ship Parts Expe		2175 Order Day Tracking # Order Day Ship Date Ship Mate Parts Dage Date 30h Num Parts Dage Date 30h Num I 107 United B Ger	ste Acknowledged	Amount Category	200 200	Type Total Cost	\$0.00
Edit Drop Ship Parts Expe		2175 Corder Qu Tracking # Order Qu Ship Date Ship bat Parts Due Date Ship tet Information Ship Ship Ship Ship Ship Ship Ship Ship	ste Acknowledged	Amount Category	Job	Type	

### Reports

### **AP Retroactive Aging Report**

Several new options have been added to this report.

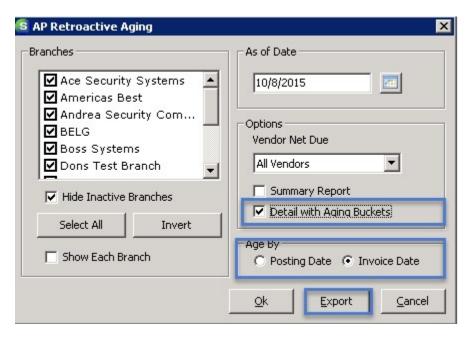
This report may now be exported into a .csv format.

An option has been added to age by invoice date. The prior version of this report used the posting date for two purposes:

- 1. To select which vendor bills and credits will be selected
- 2. Calculate how many days the invoice was past due.

This new feature still uses the posting date to select which bills and credits will be selected so that it ties to the General Ledger, but it uses the Due Date/Credit Date to calculate how many days each bill is past due.

An option has been added to include detail with the aging buckets. This shows only a few columns for each bill/credit, but it has aging buckets for Current, 1-30, 31-60, 61-90, 91-120, and over 120. Credits are put into the correct aging bucket. This is different from the Summary version which has a separate column for Credits.



## AP Retroactive Aging SedonaSecurity

Vendor	Reference	Date	Due Date	Current	1-30 days	31-60 days	61-90 days	91-120 days	over 120	Total
A+ Cleaning Services	H8942	9/30/2015	10/30/2015	500.00	0.00	0.00	0.00	0.00	0.00	500.00
									-	500.00
ABC Service Provider	76421	10/12/2014	10/12/2014	0.00	0.00	0.00	0.00	0.00	200.00	200.00
	12365	10/12/2014	10/12/2014	0.00	0.00	0.00	0.00	0.00	100.00	100.00
	12345	9/26/2014	9/26/2014	0.00	0.00	0.00	0.00	0.00	100.00	100.00
	9876	10/12/2014		0.00	0.00	0.00	0.00	0.00	(15.52)	(15.52)
									<u>.</u>	384.48
ADI	12398	9/14/2015		0.00	(100.00)	0.00	0.00	0.00	0.00	(100.00)
	4341P	11/20/2014		0.00	0.00	0.00	0.00	0.00	(315.47)	(315.47)
	213213	6/5/2012		0.00	0.00	0.00	0.00	0.00	(3,514.26)	(3,514.26)
										(3,929.73)
ADI-Madrid	CM1622	6/10/2014		0.00	0.00	0.00	0.00	0.00	(45.00)	(45.00)
	RMA777	5/30/2014		0.00	0.00	0.00	0.00	0.00	(100.00)	(100.00)
										(145.00)
American Express		8/10/2015	8/10/2015	0.00	0.00	24.00	0.00	0.00	0.00	24.00
		8/6/2015	8/6/2015	0.00	0.00	0.00	100.00	0.00	0.00	100.00
		6/16/2015	6/16/2015	0.00	0.00	0.00	0.00	113,358.29	0.00	113,358.29
		5/22/2015	5/22/2015	0.00	0.00	0.00	0.00	0.00	67.50	67.50
	963856	2/24/2015		0.00	0.00	0.00	0.00	0.00	(291.12)	(291.12)
										113,258.67
Applied Wireless Indentification Inc.	BCDE45	6/16/2015	7/16/2015	0.00	0.00	0.00	200.00	0.00	0.00	200.00
										200.00
ATL - ATL, Inc.	9354AQ	9/22/2015	10/22/2015	988.71	0.00	0.00	0.00	0.00	0.00	988.71
	78965H	9/22/2015	10/22/2015	100.00	0.00	0.00	0.00	0.00	0.00	100.00
	CM2165	6/22/2012		0.00	0.00	0.00	0.00	0.00	(270.38)	(270.38)
										818.33
Bentley Construction Company	GHR	10/5/2015	10/5/2015	0.00	200.00	0.00	0.00	0.00	0.00	200.00
	RST	9/22/2015	9/22/2015	0.00	100.00	0.00	0.00	0.00	0.00	100.00
										300.00

### **Sales Management**

#### **Prospects**

It is now possible to have a new prospect created in Sales Management on the basis of a resolution code to a service or inspection ticket. When a resolution code that is marked as "Create a New Prospect" (see SedonaSetup Resolution Codes) has been applied to a service or inspection ticket, and the ticket is subsequently closed, a new prospect will automatically appear in the Prospect list within Sales Management.

		Ticket #3598
Ticket	Central Station  Appointments Billing Documents (0) Equipment and Parts Go To	Al Notes Other Purchase Service Ticket Ticket (1) Items Orders (1) History Log Group Notifications
Site Waggi 458 C	ng Tails Pet Spa ng Tails Pet Spa Created By Administ anton Center Road n MI 48187 Status Closed	D15 2:51 PM Contact Barkley Wiggins   trator Phone (734) 948-1212 Ext  Notify bwiggins@wtp.com D15 11:19 AM
Site and System Det System Account System Type	sil [987] Intrusion	Ticket Detail  Problem Add Equipment Secondary Problem
Panel Type Location Next Inspection Site Phone	[734] 948-1212	Route Code       Expertise       3       Priority       Medium
Map Code Cross Street Warranty	Full Warranty	Estimated Length 120 Comments Additional panel for intrusion system.
Warranty End Memo Comments	Expired	Service Coordinator       Technician       Bernie Booth       P0 #
Notes Secondary Account Keys		Category SVC T&M Resolution Insp Complete - Prospect Use Payment Information On File
Service Company Service Level Receiver/Transmitte	T&M-Res	C None Bank (0) C Credit Card (0)
<u>.</u>		Save

tame         Cempany         Addressin         Proce in the Segretion         Plays         Polono         Solution         Temperature         Survey         Control in the Segretion           Segretion				All Departr		All Salespeop		÷		1911 (1911)		1	
Stars, Casely         Cold         Display         Cold         Trade Store           Stars, Casely         Display         Cold         Trade Store         Cold         Trade Store           Stars, Casely         Display         Cold         Cold         Cold         Trade Store           Stars, Casely         Display         Cold         Cold         Frage Store         Frage Store           Stars, Stars, Casely         Display         Stars, Store         Stars, Store         Frage Store         Frage Store           Stars, Store         Stars, Store         Stars, Store         Stars, Store         Frage Store         Frage Store           Stars, Store         Stars, Store         Stars, Store         Store         Frage Store         Frage Store           Stars, Store         Stars, Store         Store         Store         Store         Frage Store         Frage Store           Stars, Store         Store <td< th=""><th></th><th>Company</th><th>Address 1</th><th>Phone 1</th><th>Department</th><th>Salesperson</th><th></th><th></th><th></th><th>Status</th><th>Temperature</th><th>Source</th><th></th></td<>		Company	Address 1	Phone 1	Department	Salesperson				Status	Temperature	Source	
d, Jack         E00 (Derry HIII         (73) 444-444         Seles         Jana Date         388         (16) (2015)         1-3         Parting         Warm         Curdemeted           er, Joon         1234         Mode         (74) 54-44         Seles         Over Biss         124         Norm         H-10         Sel-44         Norm         H-10         Seles         Over Biss         64         Norm         H-10         Seles         Over Biss         Seles				14			839	10/24/2	5				
Wey, Notal         2265 Towner         (73) 551-9822         Sele         Olver Biss         1162         New         HOT         Self-Generated           Nr. 2e         2211 Hage         Sele         Over Biss         64         New         HOT         Catolane Poles           Nr. 2e         2211 Hage         Sele         Over Biss         64         New         HOT         Catolane Poles           Nr. 2e         2211 Hage         Sele         Over Biss         64         New         HOT         Catolane Poles           Nr. 2e         Sele         Over Biss         64         New         HOT         Catolane Poles           Nr. 2e         Sele         Sele         Sele         Sele         Sele         New         HOT         Catolane Poles           Nr. 2e         Sele								10/17/2	-2				
en lichter en j.ber jage 1, bege tage 1, belach tage 1, be								10/6/2015	-13				
er, Der Rach, Mchael         Siele Sieles         Ohrer Biss Sieles         Ohrer Biss Sieles         Ohrer Biss Sieles         Ohrer Biss Sieles         Ohrer Biss Sieles         New HoT         Customer Refe           sieles         Ohrer Biss         Sieles         Sieles         Sieles         Sieles         Sieles         New         HOT         Customer Refe           sieles	nley, Victoria		2265 Towner	(734) 351-9822									
tate, Mbale         Size         Olver Bis         644         New         HOT         Cutore Refe           Tof Pacels         12 Anywhere Street         C119 385-122         Seles         Bern Byoch         C22         Sold         HOT         Cutore Refe           Standbard         C119 385-122         Seles         Bern Byoch         C21         Sold         HOT         Cutore Refe           Standbard         C119 385-122         Seles         Bern Byoch         C21         Sold         HOT         Cutore Refe           Standbard         C119 585-122         Seles         Senet Wyman         C12         Sold         HOT         Cutore Refe           Standbard         C120 555-122         Seles         Senet Wyman         Standbard         Hot         New         HOT         Cutore Refe           Standbard         C120 555-122         Seles         Senet Wyman         Standbard         Hot         Vard San         Vard San           Standbard         C120 Standbard         C120 Standbard         Standbard         Senet Wyman         Standbard         Vard San         Vard San         Vard San           Standbard         Catego Standbard         C120 Standbard         C120 Standbard         Standbard				(440) 247-5603									
radin         radin <th< td=""><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></th<>													
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sahadi number         Barking Hound Day Car         Barking Hound Day	nson, Michael												
us Shelon         Data         D23 Anywhere Street         Sales         Bernie Booth         311         Sold         Wort         Cultomer Refe           one Bachming Hound Duy Carl         129 Waythere Street         Sales         Sond Winner         11         Sold         Ward         Cold         Yard Sign           one Bachming Hound Duy Carl         129 Bach Stream         (73) SS512.02         Sales         Sond Winner         Sold         Ward Sign         Sold         Ward Sign         Sold         Ward Sign         Sold         Ward Sign         Sold Stream         Sold Stream<													
Virg Hourd Day Car         123 Way Tales Law         (216) 955-122         Seles         Son Wymm         11         Sold         Warm         Self-Grammed Instrument		Barking Hound Day Car		(216) 555-1212									
onial Blackmon-Lipse       (73) 5571.0.       Sales       Span Wymen       101       New       Cold       Vard Syn         bite Stevens       123 beek Shal Lare       Sales       Don Synth       77       Pendog       Ward Tode       Vard Syn         Ward Machael       622 Bayes/More Parlwy       105 bookbart/ court       140 bookbart / court       Sales       Berne Book       42       Sale       Sale <td< td=""><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></td<>													
base Stevens         Conc Flyding         Total Stevens         Warm         Total Show           Under Aubroso         1000 Registant/Conc (M/G)/145002         Beerie Booth         33         Introdeces         1000 Registant/Conc (M/G)/145002         Beerie Booth         22         Introdeces         1000 Registant/Conc (M/G)/145002         Beerie Booth         22         Introdeces         1000 Registant/Conc (M/G)/145002         Beerie Booth         252         Introdeces         M/G         Introdeces         1000 Registant/Conc (M/G)/145002         Beerie Booth         252         Introdeces         M/G         Introdeces         Introdeces         M/G         Introdeces <td></td> <td>Barking Hound Day Car</td> <td></td> <td></td> <td>Sales</td> <td>Sean Wyman</td> <td>311</td> <td></td> <td></td> <td>Sold</td> <td></td> <td></td> <td></td>		Barking Hound Day Car			Sales	Sean Wyman	311			Sold			
Utim Actorse         180 Roschur Coxt         (440) 247-2802         Sole         Bernie Boch         33         In-Process         HOT         Vard Sim           mann, Cardyn         S23 Bar, 195 S5-3122         Sele         Bernie Boch         421         Sold         HOT         Sold-Concreted           S21 Main         (60) 555-100         Sele         Sele         Sele         Sele         Sele         All Term         New         HOT         Customer Refe           S45 Daria         Brank (500) 555-3722         Sele         Sele         Sele         Sele         All Term         New         HOT         Customer Refe           S45 Daria         Warging Tales Pet Spe         450 Canton Canter         Sales         Dernie Boch         2.52         New         Warm         Salex Techn           Name         First         Fir				(734) 555-12	Sales		161			New	Cold	Yard Sign	
Utim Actorse         180 Roschur Coxt         (440) 247-2802         Sole         Bernie Boch         33         In-Process         HOT         Vard Sim           mann, Cardyn         S23 Bar, 195 S5-3122         Sele         Bernie Boch         421         Sold         HOT         Sold-Concreted           S21 Main         (60) 555-100         Sele         Sele         Sele         Sele         Sele         All Term         New         HOT         Customer Refe           S45 Daria         Brank (500) 555-3722         Sele         Sele         Sele         Sele         All Term         New         HOT         Customer Refe           S45 Daria         Warging Tales Pet Spe         450 Canton Canter         Sales         Dernie Boch         2.52         New         Warm         Salex Techn           Name         First         Fir			123 Beach Sand Lane			Don Faybrick	77			Pending	Warm	Trade Show	
ureen diser         623 Baychore Parkway         (510) 955-1120         Seles         Self View         167         Sold         HOT         Customer Refe           sere Black         Purge Basement Bar         4251 Ford Rood         (74) 955-900         Seles         ADI Testing         27         Pending         HOT         Customer Refe           hDawd         4251 Ford Rood         (74) 955-900         Seles         ADI Testing         27         New         HOT         Customer Refe           hDawd         4251 Ford Rood         (74) 955-900         Seles         Dernie Booth         4.2         New         HOT         Customer Refe           hiey Wagnis         Wagning Tales Pet Spa         490 Caxdon Carber         Seles         Dernie Booth         4.2         New         Warm         Detraited           hiey Wagnis         Wagning Tales Pet Spa         490 Caxdon Carber         Seles         Dernie Booth         4.2         New         Warm         Detraited           hiey Wagnis         Wagning Tales Pet Spa         490 Caxdon Carber         Seles         Dernie Booth         4.25         New         Warm         Dernie Booth         4.25         New         Marm         Dernie Booth         4.25         Nem         Annotes         Annotes	tlyn Ambrose		180 Rosebury Court	(440) 247-5602	Sales					In-Progress		Yard Sign	
incon, Carolyn Burger Barder, Barder Spar         321 Main (274) 1955 2007 000 (724) 2555 2007 000 (725) 2557 2007 2007 2007 2007 2007 2007 2007			623 Bayshore Parkway	(516) 555-1212	Sales		421				HOT	Self-Generated	
Bunder         Bunder         734/55-Ford Same         Sales         ADI Testing         7         Pendig         HO1         Cutomer Infermination           Heb David         734/55-508         Sales         Derive Book         5         New         Warm         Tetwerse           Heb David         734/55-508         Sales         Derive Book         5         New         Warm         Service Technini           Heb David         458         Ganton Center         Sales         Derive Book         5         New         Warm         Service Technini           Heb David         458         Ganton Center         Sales         Derive Book         5         New         Warm         Service Technini           Heb David         458         Ford Sales         Cature Fermionics         Sales         Cature Fermionics         Sales         Cature Fermionics         Sales         Sales         Cature Fermionics         Sales	nnson, Carolyn					Sean Wyman				New	HOT		
eth     123     Los dev     73 (SES.0000     Con Exploit     6.     Los dev     Marm     Totarcat       Idey Wogins     450 Carton Center     53les     Bernie Booth     2.52     New     Warm     Service Techni       Idey Mogins     450 Carton Center     53les     Bernie Booth     2.52     New     Warm     Service Techni       Idey Mogins     450 Carton Center     54les     Bernie Booth     2.52     New     Warm     Service Techni       Idey Mogins     1dey Mogins     1dey     Idey	xene Blakely	Burger Basement Bar	42515 Ford Road			ADI Testing	27			Pendina	HOT	Customer Refe	
	hith David	9.520	1234 Joy Poad	(734) 555,8888	Saler	Don Eavbrick	6			Loct	Warm	Internet	
	rklev Wiggins	Wagging Tales Pet Spa	458 Canton Center		Sales	Bernie Booth	2.52			New	Warm	Service Techni	
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Number of Prospects													
Number of Prospects													
Number of Prospects													
Number of Prospects													
													Number of Prospects
Show Inactive													



When the prospect record is edited, a reference appears noting the service ticket number which generated the lead. The technician on the service ticket is automatically named as the salesperson for this prospect as a default. This can be changed to another salesperson if needed.

🙆 Edit Prospect - E	Barkley Wiggins	_ 🗆 🗙
Sales Manage	Prospect	
Prospect	Wagging Tales Pet Spa     Source     Service Technician       Barkley Wiggins     Status     New       458 Canton Center Road     Sales Dept     Sales Dept       Canton, MI 48187     Salesperson     Bernie Booth Follow Up       # Days Open 2.52669988425623	
Qualifications	Prospect Entry	
Contacts (0)	Existing Customer (388) C gesidential © Commercial Entered By: Administrator, 10/16/2015	
	Company Wagging Tales Pet Spa Master Account	
<b>9</b>	Name Barkley Wiggins Warm	
Opportunities (0)	Let Phone L	
	Phone 2	
	Address 498 Canton Center Road	
Note Log	Mobile	
	Bager	
Documents	Status New Fax Email	
	Ph. Source Service Technician	
QuoteWerks		
	Re-Flag 2nd Salesperson Z	
	Next Folow Up	
	Resolution Resolution Date	
	Comments:	
	-	
	L 4 Inactive	
	Service Ticket #3598	



Information from the Service Setup Table (see SedonaSetup Table – Service Setup) automatically populates into the screen.

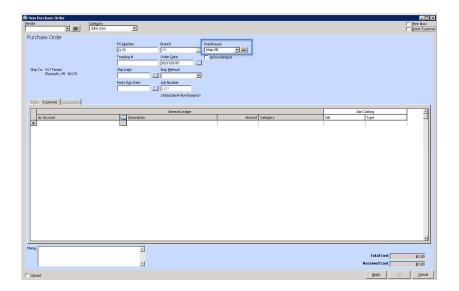
🙆 Edit Prospect - I	Barkley Wiggins	- 🗆 ×
Sales Manage	Prospect	
Prospect	Wagging Tales Pet Spa     Source     Service Technician       Barkley Wiggins     Status     New       458 Canton Center Road     Sales Dept     Sales       Canton, MI 48187     Salesperson     Bernie Booth Follow Up       # Days Open 2:52669988425623	
Qualifications	Prospect Entry	
Contacts (0)	Existing Customer (388) C Residential C Commercial Entered By: Administrator, 10/16/2015	
	Company Wagging Tales Pet Spa Master Account	
Opportunities	Name Barkley Wiggins Emperature Warm	
(0)	Title Phone 1	
12	Address   #58 Canton Center Road Phone 2	
Note Log	Address 458 Canton Center Road Phone 2 Canton, MI 48187 Mobile	
	Bager	
Documents	Status New Fax	
	Pri. Sogree Service Technidan	
	Sec. Source Sales Department Sales	
QuoteWerks	Re-Flag Salesgerson Bernie Booth 🗶 🕅	
	2nd Salesperson	
	Resolution Date Comments:	
	L 40 P I Introduce Apply	
	Service Ticket #3598	

### SedonaSetup

### **Install Company**

A new warehouse field has been added to the install company table. The warehouse associated with the installation company will be the default warehouse selected on all purchase orders created from within a job that are not direct expensed.

Sedona Setup		Install Companies		
escription	Area			
Job Types	JM	Install Company Setup		
Job Tasks	JM	Code	Description	Inactive
Job Statuses	1M	MI	SedonaSecurity	N
Job Phases	зм	OH	SedonaSecurity	N
Job Expense Types	JM	MI-ND	MI-No Dispatch	N
Job Approval Group	JM			
Item Types	AR			
Invoice Items	AR			
Invoice Descriptions	AR	🗖 Include Inactive		
Inventory Setup	IN			
Integration Setup	OP	📰 Install Company Setup		🗂 Inactive
Instruction Notes	sv		-	
Installers	зм	Install MI	Parts WIP 122100	<b>_</b>
Install Companies	JM	Description SedonaSecurity	Misc WIP 122140	
Inspection Items	sv	1	Warehouse Main-MI	
Holidays	sv			<u> </u>
GL Account Defaults	AP	n 🔊 🗹 Labor To GL	🥪 🗖 Overhead	
GL Account Defaults	AR		Overhead Debit	
Geographic Tables	OP	Labor Expense @ Expense at time of entry	/ Overneau bebit	<u>د</u> الت
Event Types	SM	Type C Expense thru WIP		
Employees	OP		Overhead Credit	•
EFT Setup	AR	Labor Expense 510002 💌 🖳		
EFT Credit Card Types	AR	CO5 - Jobs-Labor		
Earnings Type	PR	Labor Deferred 258100		
Document Type	OP	Deferred Labor - Jobs*		
Departments	OP			
Define GL Segments and Length	GL	Labor WIP 122120 💌 🛄		
Default Vendor	OP	WIP - Job Labor		
Default Labor Rates	SV			
Data Entry Defaults	CM	Appointment Options		
Customer Part Groups	IN	Dispatch Hours W	'eekends Timesheet	
Customer Groups	CM	• Yes	🔽 Saturday 🔍 Auto 🔍	From Dispatch
Custom Fields Table8 (Service)	sv	C No (Completed Only)	C Manual C	From Arrival
Custom Fields Table7 (Service)	sv	End 17	E Sunday	
Custom Fields Table6 (Service)	sv			
Custom Fields Table5 (Service)	sv 🖕	1	Apply N	ew Deleta



### **Resolution Codes**

The resolution code table has been updated to enable a prospect to be automatically created in the Sales Management module based on a resolution code. In the example below, in the course of a routine inspection of a system, the customer indicated interest in having an add-on to their system. By using the resolution code indicated on the inspection ticket, when the inspection ticket is closed, the customer is added to the prospect queue.

Sedona Setup			Resolution				
escription	Area						
Statement Rules	AR						
Signal Types	CS		Company and a second				
Shipping Methods	AP		Resolutions				
Setup Processing	AP						
Setup Processing	AR		Resolution	Description	Billable	Prospect	Inactive
Setup Processing	JM		1 Add	Add Equipment	Y	N	N
Setup Defaults	sv		2 Clean	Clean Equipment	Y	N	N
Service Ticket Message	sv		3 Repair	Repair Equipment	Y	N	N
Service Levels	sv		4 Replace Clock Out	Replace Equipment Ticket was clocked-out	¥ N	N	N
Service Companies	sv		Code Changes-B	Code Changes Completed-Billable	Y	N	N
Sedona Modules	OP		Code Changes-NC	Code Changes-No Charge	N	N	N
Scheduling and Appointments	sv		Cust Cancel	Customer Cancelled prior to Appt Date	N	N	N
Sales Resolution Codes	SM		Go Back	Go Back Required	N	N	N
Sales Managers	SM		Insp Comp.	Inspection Completed	Y	N	N
Sales Items	SM	_	Insp Complete -		Y	Y	N
Sales Departments	SM		Insp DeclBillable		Y	N	N
Sales Department Maintenance	SM		Insp Decl-Non-Billa	·	N	N	N
Routes	SV		Insp In Progress No Show	Insp In Progress No Show	Y	N	N
RMR Reasons	CM		Site Survey	Site Survey Complete	Y	N	N
RMR Escalations	CM		Sys Restore	Svs Restore in Central Station	N	N	N
Resolution Codes	sv		Void	Void	N	N	N
Quote Types	SM		Warranty	Warranty	N	N	N
Product Line	IN		1000000000				
Problem Codes	SV		•				
Problem Codes Printer Setup	OP		🗌 Include Inactiv				
Printer Setup Prevailing Wages	UP JM		j include Inactiv				
	J™ PR		Resolution Edit				
Payroll Setup			En resources Earc			Inac	tive F
Payment Methods	CM		Resolution Code	Insp Complete - Prospect			
Part Labor Unit Desc	IN			, , ,			
Panel Types	sv		Description	Insp Complete - Prospect			
Open Current Accounting Period	GL						
Note Type	OP		Billable				
Material Handlers	IN						
Manufacturer	IN		<u>C</u> reate Prospect				
Lead Sources Late Fee Rules	SM AR				Apply	New	Delete



### **Service Setup**

The Setup Defaults SV table within SedonaSetup has been modified to add a section for Prospect Defaults. When a prospect is added to the Sales Management module as the result of closure of a service or inspection ticket that is marked to create a new prospect, the information in this section will automatically populate in the prospect record.

Sedona Office Setup (SedonaSecu ile Find Find Next View Tools Hel							
Sedona Setup	P		Corulao Cotur				
Description	Area		Service Setup				
Warranty Types	sv						
Warehouses	IN						
Vendors	AP		Concral Setup   CL Set	up GL Accounts for Misc Expense			
Vendor Types	AP		deneral betup   GL Set	up   GE Accounts for Misc Expense			
Users	OP		() General		🥜 Maintenance Contr	acts	
User Groups	OP		Defeult Courtes Co	MI-T8M	It leaves to Taxa	E	
User Defined Table4	SM		Default <u>S</u> ervice Co.	MI-T&M	Wa <u>r</u> ranty Type	Full Warranty	<u> </u>
User Defined Table3	SM		Next <u>T</u> icket #	0000	Service Level	T&M-Res	•
User Defined Table2	SM		Next Ticket #	3600	Sel Alce revel	Tamines	
User Defined Table1	SM				📰 Invoice Defaults		
User Defined Setup	SM				50 00 00000	<u></u>	
UL Grade	CS		and a second		Invoice Category	SVC T&M	
Type Of Customer	CM		Ticket Printing	Print the System Account on Service Tickets		r	
Transmission Format	CS			Service Tickets	Invoice De <u>s</u> cription	Service Call	
Terms	AP			When Printing Tickets, break	Dauta Itaus Carla	Laure 1 and	1
Terms	AR			🔽 out the Trip Charge on the	Parts Item <u>C</u> ode	SVC Part-TX	<u> </u>
Technicians	sv			Summary			
Tax Tables	AR				Prospect Defaults		
Tax Groups	AR		Note Access Level	2 - Customer Restricted	Lead Source	Service Technician	•
Tax Agency	AP				Ford con co	J Der vice Technician	1
System Types	СМ				Lead Source 2	1	-
Status	SM		Schedule By	Technician Expertise Level	_		
Statement Rules	AR			C Routes	Stat <u>u</u> s	New	
Signal Types	CS					1.000 C	
Shipping Methods	AP		Warning Message S	of m	Sales <u>D</u> epartment	Sales	Y
Setup Processing	AP		marning message a	emh.	00000		
Setup Processing	AR		999 or more dis	patches within the last $1$ day	10		
Setup Processing	лc		1999 OF MORE did		Ĩ		
Setup Defaults	SV						
Service Ticket Message	sv						
Service Levels	sv						
Service Companies	sv						
Sedona Modules	OP						
Scheduling and Appointments	sv						
Sales Resolution Codes	SM					Ē	Apply
Sales Managers	SM	-					

#### **User Groups**

A new permission entitled "Edit Costs on Purchase Orders" has been added to the Accounts Payable permissions in the user group table. This permission must be given to users who will need to edit the prices on purchases orders after the purchase order has been initially saved. Users who do not have this permission will not have access to add new expenses, new parts or, if using the ADI Integration, the price check button.

Sedona Setup		loor Croups		
escription	Area	Jser Groups		
Vendors	AP	📃 User Groups		
Vendor Types	AP			
Users	OP		ription	Level Credit Limit
User Groups	OP	Accounting Clerk Acco Admin Admin	unting Clerk	2 \$5,000.00 3 \$100.00
User Defined Table4	SM		nistrator	3 \$10,000.00
User Defined Table3	SM		Uery Only	3 \$0.00
User Defined Table2	SM		Entry Job	1 \$1.00
User Defined Table1	SM	Dealers Deale		2 \$0.00
User Defined Setup	SM		ers View with Notes htory Clerk	1 \$0.00 2 \$0.00
UL Grade	CS	Mapager Mapa		2 \$0.00 3, \$1.000.00
Type Of Customer	CM	•		
Transmission Format	CS	Include Inactive		
Terms	AP	User Group Edit		
Terms	AR	ED Oser Group Euro		🗌 I <u>n</u> activ
Technicians	SV			
Tax Tables	AR	Code Description		Level Credit Memo Lim
Tax Groups	AR	Administrator Administrator		3 💌 \$10,000.00
Tax Agency	AP	Application Access Report Access		
System Types	CM			
System Types Status	SM	Access	Module	<u> </u>
Statement Rules	AR	Edit Existing Transactions	AP	
		ADI Integration	AP	
Signal Types	CS AP	Vendor Custom Fields	AP	
Shipping Methods		Vendor Documents	AP	
Setup Processing	AP	View Only Access for Checks	AP	
Setup Processing	AR	Edit Vendor Notes	AP	
Setup Processing	лс	Delete Vendor Notes	AP	
Setup Defaults	SV	Access to Secure Vendors	AP	
Service Ticket Message	sv	Override Expense Type	AP	
Service Levels	sv	Read Only Vendor Access	AP	
Service Companies	sv	Hide Vendor Social Security No	AP	
Sedona Modules	OP	Edit Costs on Purchase Orders	AP	
Scheduling and Appointments	SV	Inventory	IN	-
Sales Resolution Codes	SM			
Sales Managers	SM			
Sales Items	SM	Print		Apply New Delete

### **Application Corrections**

### **Accounts Payable**

### **Credit Memos**

Reported Issue: A runtime error was received when a new vendor credit memo was being created while another one was open and minimized. This issue has been corrected.

### **Purchase Orders**

Reported Issue: When multiple line items for the same part were entered onto a PO, and the user clicked on Apply before clicking the OK button, the PO looked correct on the screen. When the PO was re-opened to edit, however, the first line of the multiple part had been deleted. This issue has been corrected.

### Vendors

Reported Issue: When a new vendor was created with an address using the country of China, an error message appeared when the province was entered on the address screen. This issue has been corrected.

### Accounts Receivable

### **EFT Processing**

Reported Issue: When a batch was returned from Forte, and the user looked in Submitted Transactions, none of the files returned by Forte were marked as having been returned with a Y in the Returned column. This issue has been corrected.

### **Miscellaneous Invoice**

Reported Issue: Add two non-recurring items onto a miscellaneous invoice. Place the cursor on the second line and press delete. Both line items were deleted, and a run-time error appeared. This issue has been corrected.

### **Payment Processing**

Reported Issue: Reverse credit card transactions came into a payment batch with a negative dollar amount. If the transaction was opened in payment processing, and the user pressed the Save button, the total amount recorded as entered for the batch added the negative transaction to the total of the batch instead of subtracting it. This issue has been corrected.

### Statements

Reported Issue: Statements that were printed using the Bill To address option did not have credits shown on the statement. This issue has been corrected.

### **Client Management**

### **Print Statement**

Reported Issue: When a statement was being printed for an individual customer, and the user did not select Site Totals from the Print Preferences menu, the site totals printed on the statement. This issue has been resolved.

### Inventory

### **Transferring Parts**

Reported Issue: Parts are added to the transfer request list. Click on Save but do not Save/Receive into a warehouse. Add another part to the request list. When the recipient of the parts clicked on Receive, the part that was added after the first save appeared multiple times. This issue has been resolved.

Reported Issue: If a user selected "For Job/Ticket" but failed to enter the number of a job or service ticket, a Run-time Error 13 appeared and closed SedonaOffice. This issue has been resolved.

Reported Issue: Sorting the transfer list by transfer # caused the numbers to convert into dates in the year 1900. This issue has been resolved.

### Jobs

### Billing

Reported Issue: A "Runtime Error 5" was received when trying to create an invoice from the job billing queue for a customers that had a checkmark in the Customer Information section "Bill This Sub To Master" but who were not subaccounts of a Master Account. This issue has been resolved.

### **Closing A Job**

Reported Issue: A "3201 Either BOF or EOF" error message was received when attempting to close a job. Custom fields either were defined within the job or at one time had been defined and since removed from the Custom Job Setup table. This issue has been resolved.

### Commissions

Reported Issue: When a gross profit commission was assigned to a salesperson on a job that had a loss, a negative commission was created instead of no commission. This issue has been resolved.

### **Point of Sale**

### **Returning Items Paid by Credit Card**

Reported Issue: When an item was returned which had been paid by a credit card, the credit went back onto the credit card as designed. The next sale item, however, processed as a credit card return. This issue has been resolved.

### **Reports**

### **GL Register Entries**

Reported Issue: The ending balance was the amount of the last transaction entered instead of the balance on the account on the last day of the range of dates chosen. This issue has been corrected.

### **Receipt of Goods**

Reported Issue: When the same start and end dates were chosen as the range (e.g. looking for activity on only one day), the report appeared blank with the date 12/30/1899. This issue has been corrected.

### Taxable/Non-Taxable Sales Report

Reported Issue: The full name of the city/county was being truncated due to the size of the field. This issue has been corrected.

### Service

### **Appointments**

Reported Issue: When an appointment had not been resolved by the technician prior to invoicing the ticket, Sedona would not allow the ticket to be closed. This issue has been corrected.

### **Ticket Type**

Reported Issue: Under specific circumstances, the label given to a Vendor Inspection ticket was incorrectly given the name Vendor Service. This issue has been corrected.