



Release Notice

Version 5.7.31

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8401 Chagrin Blvd. – Suite 15B
Chagrin Falls, OH 44023

SedonaOffice

440.247.5602

45185 Joy Road
Canton, MI 48187

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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 5.7.26. This is an intermediate version update that contains new features and application corrections.

Application Enhancements/Improvements

Accounts Payable

Expense Tab - Purchase Orders, Receipts, and Bills

The expenses tab on Purchase Orders now includes a rate and quantity field.

Purchase Order 2345

Vendor: J&M Security Inc. Category: Jobs Res

Purchase Order: J&M Security Inc., 27 Stonewall Court, Cleveland, Ohio 44110, Phone: (440) 878-6971, Fax: [redacted]

Ship To: SedonaSecurity, 547 Washington, Chagrin Falls, OH 48022

Drop Ship

PO Number: 2345 Branch: OH

Tracking #: [redacted] Order Date: 2/15/2016 Acknowledged: []

Ship Date: [redacted] Ship Method: [redacted]

Parts Due Date: [redacted] Job Number: 1042

Johnson Life/Gandara Ctr

Parts: 0.00 Expense: 7500.00 Documents

GL Account	Description	Qty	Rate	Amount	Rcvd	Cost	Category	Job	Type
510004	COS - Jobs-Subcontract	100	75.00	7500.00	0	0.00	Jobs Com	1042	O

Partial receipt of expense only POs may now be made either by quantity or amount.

Parts Receipt

Vendor: J&M Security Inc. Category: Jobs Res

PO# 2345

J&M Security Inc., 27 Stonewall Court, Cleveland, OH 44110

Reference #: [redacted] Branch: OH

Receive Date: 2/15/2016 Received By: [redacted]

Job Number: 1042 COGS Acct: 520001

Johnson Life/Gandara Ctr

Direct Expense [X] Receive [] Receive & Issue Immediately []

Close - No Bill Expected [] Create Bill From Receipt []

Parts: 0.00 Expense: 1875.00 Documents Show Branches [X]

GL Account	Description	Qty	Rate	Amount	Branch	Category	Job	Type
510004	COS - Jobs-Subcontractors	25	75.00	1875.00	OH	Jobs Com	1042	O

Partial receipt of the expense does not automatically close the PO:

Close Purchase Order

? You have selected a PO with no parts ordered. Do you wish to close this PO now?

Yes No

The open Purchase Order List now reflects the received quantity of expense only items:

Purchase Order List											
Vendor	J&M Security Inc.										
<input checked="" type="checkbox"/> BELG	PO Number	Vendor	Order Date	Due Date	Type	Number	Amount	Received	Memo	Ack	Ack By
<input checked="" type="checkbox"/> Belgium	2345	J&M Security Inc.	2/15/2016		JOB	1042	7500.00	1875.00		N	
<input checked="" type="checkbox"/> BR											
<input checked="" type="checkbox"/> MI											

The Purchase Order now tracks and shows the quantities and costs received for the expense line:

Purchase Order 2345

Vendor: J&M Security Inc. Category: Jobs Res

Purchase Order

J&M Security Inc.
27 Stonewall Court
Cleveland, Ohio 44110
Phone: (440) 878-6971
Fax:

Ship To: SedonaSecurity
547 Washington
Chagrin Falls, OH 48022

Drop Ship

PO Number: 2345 Branch: OH

Tracking #: Order Date: 2/15/2016

Ship Date: Ship Method:

Parts Dye Date: Job Number: 1042

Johnson Life/Gandara Ctr

Parts: 0.00 Expense: 7500.00 Documents

General Ledger						Job Costing		
GL Account	Description	Qty	Rate	Amount	Rec'd	Cost	Category	Job
510004	COS - Jobs-Subcontract	100	75.00	7500.00	25	1875.00	Jobs Com	1042

Created By: Administrator 2/15/2016 8:50:40 AM
Edited By: Administrator 2/15/2016 8:50:40 AM

Total Cost: 7500.00
Received Cost: 1875.00

OK Cancel

Bills can now be entered with a quantity and rate in the expense tab.

Bills

Vendor: J&M Security Inc. Category: Jobs Res

Vendor Bill for PO# 2345

Vendor: J&M Security Inc.
Address: 27 Stonewall Court
Cleveland, OH 44110

Reference #: 2468 Branch: MI

Terms: Net 10 Amount: 1875.00 GST: 0.00

Bill Date: 2/15/2016 Payment Due: 2/25/2016 Posting Date: 2/15/2016

Eligible for Discount Amt: Job Number: 1042 Johnson Life/Gandara Ctr

Parts: 0.00 Expense: 1875.00 Documents: ☒ Show Branches ☒ Show Job Cost

General Ledger							Job Cost		
GL Account	Description	Qty	Rate	Amount	Branch	Category	Job	Type	Pass Item
510004	CO5 - Jobs-Subcontr	25	75.00	1875.00	OH	Jobs Com	1042	O	
*									

Printed Purchase Order

When a purchase order is printed, the vendor's description of the part will now appear instead of the internal description of the part. The internal description of the part will still appear inside the PO form itself.

Purchase Order 2699

Vendor: Tri-Ed Category: cool

Purchase Order:
Tri-Ed
P.O. Box 402433
Atlanta, Georgia 30384
Phone: (800) 366-4472
Fax:

Ship To: SedonaSecurity
417 Forest Ave
Plymouth, MI 48170 - 1721

PO Number: 2699 Branch: MI Warehouse: Main-MI

Trading #: Order Date: 5/11/2016 ☐ Acknowledged

Ship Date: Ship Method: 1P 5 1DAY 8 AM

Parts Due Date: Costing:

Parts: 70.76 Expense: 0.00 Documents: No Special Order Parts Allowed ☐ Select from All Parts

Part	Description	Vendor Part	Pkg Qty	Quantity	Cost	Amount	Rcvd	Std Cost	BO
5800PIR	This is the internal part desc	5800PIR	1	1	70.76	70.76		70.76	<input type="checkbox"/>
*									<input type="checkbox"/>



To: **Tri-Ed**
P.O. Box 402433
Atlanta, GA 30384

Telephone: (800) 366-4472

Ship To: **SedonaSecurity**
416 Forest rd
Plymouth, MI 48170

<i>Purchase Order</i>	
PO Number 2699	Date 05/11/2016
Warehouse	Total Cost 70.76

Order Date	Category	Shipping Date	Ship Via	Shipping #	Due Date
05/11/2016	cool				
Part/Expense	Description	Quantity	Unit Cost	Total Cost	
5800PIR	This is the vendor's description (5800PIR)	1	70.7600	70.76	

Receive and Issue Immediately

When a checkmark is present in the AP Setup Processing table within SedonaSetup to direct expense all jobs and service tickets, users will be presented with an error message if they attempt to change the radio button on the PO receipt to either the Receive or Receive and Issue Immediately options. The PO receipt will automatically select the option Direct Expense when this is attempted.

Sedona Office Setup (SedonaSecurity)

File Find Find Next View Tools Help

Sedona Setup

Description	Area
Custom Fields Setup (Vendor)	AP
Custom Fields Table1 (Vendor)	AP
Custom Fields Table2 (Vendor)	AP
Custom Fields Table3 (Vendor)	AP
GL Account Defaults	AP
Setup Processing	AP
Shipping Methods	AP
Tax Agency	AP
Terms	AP
Vendor Types	AP
Vendors	AP
Aging Buckets	AR
Alternate Company Addresses	AR
Banks	AR
Check 21 Setup	AR
Credit Reason	AR
EFT Credit Card Types	AR
EFT Setup	AR
GL Account Defaults	AR

AP Setup Processing

Setup | Other

Purchase Order Setup

Auto Create PO Numbers ☒

Next PO Number 2576

Direct Expense All Jobs & Tickets ☒

PPV All Standard Cost Adjustments ☒

Special Message on PO Print

AP Setup Processing - Special Message on PO Print.

Check Options

Allow Printed and Voided Checks ☐

Parts Receipt

Vendor: ADI Category: SVC T8M

PO# 2571

231 West 42nd St
New York, NY 10024

Reference # Branch
4/13/2016 Received By

Job Number COGS Acct
1228 520001

Surelock Homes

Direct Expense ☒ Receive ☐ Receive & Issue Immediately ☐

Close - No Bill Expected ☐ Create Bill From Receipt ☐

Parts: 0.00 Expense: 0.00 Documents

Part Code	Description	Vendor Part	Pkg_Qty	Quantity	Cost	Amount	Serial No	Lot No	Stand Cost
0L-410902051	METAL END CAP, NOSE	0L-410902051	1	1	0	0.00			0.00

SedonaOffice

You may only process Direct Expense receipts to Jobs and Service Tickets.

OK

Memo

Part Total 0.00
Expense Total 0.00

Print Stock Labels Apply Save Close

Accounts Receivable

Custom Invoice Form (CS06 SL)

This custom invoice format has been modified to print an OCR line 1/8 of an inch higher than was previously set.

Lockbox – Other - UCash

When this lockbox format is selected, a payment that goes to unapplied cash will no longer have the Future Auto-Apply button automatically checked.

Client Management

Bill To

A new Email Invoice field has been added to the Bill To information displayed on the customer information grid.

The screenshot displays the SedonaOffice interface for customer management. On the left is a navigation tree with categories like Customer Information, Bill To, Sites, and Activity Ledger. The main area shows a grid of customer data for 'Surelock Homes'. A blue arrow points from the 'Email Invoice' field in the grid to a 'Customer Billing' dialog box on the right.

Surelock Homes	
Billing Name	Surelock Homes
Address	123 Watson Avenue Canton MI 48187
Commercial	Y
Telephone	(273) 455-5121
Fax	
Email	amy@surelockhomes.com
Email Invoice	Y
Primary	Y
Inactive	N

Customer Billing 47726

Customer Information
Customer # 47726
Customer Name Surelock Homes

☐ Residential ☐ Commercial

Name: Surelock Homes
Additional Name:
Address: 123 Watson Avenue
Canton, MI 48187

Phone 1: (273) 455-5121
Phone 2:
Fax:
Email: amy@surelockhomes.com

☒ Email Invoices

☐ Copy Billing Address to Site

Buttons: Save, Close

Customer Query Builder

The following fields have been added to the Customer Query Builder:

<u>Category</u>	<u>Sub</u>	<u>Field Name</u>
Customer	BillTo	Bill_Country
Site		Site_Country
Inspection		Inspection_Description
Inspection		Inspection_Last_Tkt
Inspection		Inspection_Last_Tech
Inspection		Inspection_Job
Inspection		Inspection_Group_Number
Inspection		Inspection_High_Freq_Omit
Inspection		Inspection_Exclude_In_Freq_Omit
Credit_Request		Cr_Req_Requested_By
Credit_Request		Cr_Req_Requested_Date
Credit_Request		Cr_Req_Reason_Code
Credit_Request		Cr_Req_Reason_Desc
Credit_Request		Cr_Req_Memo
Credit_Request		Cr_Req_Requested_Amt
Credit_Request		Cr_Req_Approved_Amt
Credit_Request		Cr_Req_Credit_Number
Credit_Request		Cr_Req_Assigned_To
Credit_Request		Cr_Req_Assigned_Date
Credit_Request		Cr_Req_Sign_Off_Name_1
Credit_Request		Cr_Req_Sign_Off_Date_1
Credit_Request		Cr_Req_Sign_Off_Amt_1
Credit_Request		Cr_Req_Sign_Off_Notes_1
Credit_Request		Cr_Req_Sign_Off_Name_2
Credit_Request		Cr_Req_Sign_Off_Date_2
Credit_Request		Cr_Req_Sign_Off_Amt_2
Credit_Request		Cr_Req_Sign_Off_Notes_2
Credit_Request		Cr_Req_Sign_Off_Name_3
Credit_Request		Cr_Req_Sign_Off_Date_3
Credit_Request		Cr_Req_Sign_Off_Amt_3
Credit_Request		Cr_Req_Sign_Off_Notes_3
Credit_Request		Cr_Req_Edit_User
Credit_Request		Cr_Req_Edit_Date

Credit_Request	Cr_Req_Closed
Credit_Request	Cr_Req_Invoice_Number
Credit_Request	Cr_Req_Re-Inv_Cust_Number
Credit_Request	Cr_Req_Re-Inv_Cust_Name
Credit_Request	Cr_Req_Re-Inv_Number
Credit_Request	Cr_Req_Tax_Correction
Credit_Request	Cr_Req_New_Tax_Code
Credit_Request	Cr_Req_New_Tax_Desc
Credit_Request	Cr_Req_from_Jobs
EFT	Bank_Max_Amount
EFT	CC_Max_Amount

Inspections

Terminated inspections may now be opened to review information.

System Inspections

Site: Carpenter_Chapman
9 Belden Road

System: F10145
Fire

This inspection is terminated!!
Terminated On : 3/29/2016

Detail | Equipment | Inspection Items | Reports

Inspection

Description: Inspection-Fire-Sprinklers

Frequency: Annual

Service Problem Code: Insp-Sprinkler-MO

Service Level: INSP Cont-Res

Service Company: MI-INSP Cont

Last Inspection: 3/15/2015

Next Inspection: 3/15/2016

Next Inspection At: Ticket Closed

Recurring Item Link: INSP Fire Sprinkler

Cycle Amount: 150.00

Service Tech: [Dropdown]

Group Number: 1

Estimated Hours: 4

High Frequency Bypass: ☐

Exclude from High Frequency Check: ☐

Notes: [Text Area]

Charges

Inspection Item: [Dropdown]

Amount: 0.00

Cancel

Master Accounts – Customer Information

A new checkbox has been added to the Master Account Customer Information screen. When a checkmark is placed in the box entitled “Default New Sub-Accounts to Bill To Master”, all newly created subaccounts will automatically have a checkmark placed into the “All Sub Account Invoices Billed to Primary Master” box. This new default box on the Master Account will only affect new subaccounts created. **It will not change settings on subaccounts that already have been created.**

Master Account

Customer Setup 11972

Customer # 11972
Customer Name Finast
Additional Name
Finast
44522 Ann Arbor Rd
Plymouth, MI 48170

Setup Information | New Field | Bill To | Master Account Setup | Items

Customer Status ANR
Customer Type Commercial
Old Customer ID
Terms Due On Receipt
Tax Exempt #
OK to Increase
Salesperson Matt Miller
Commission Pctg 0.00

Blanket P.O.
P.O. Expire Date
Customer Since 12/3/1990
Chain Account
Customer Group MI
Customer Group 2 MI
Branch MI
No Collections
Part Pricing Level None

Master Account Information
☒ Is Master Account
Account Index 40 (For Auto Numbering)

Invoice Printing
☒ Print Cycle Invoices
☒ Print Statements
☒ Print Site Info on Invoices
☐ Separate Cycle Invoice for Each Site
☒ Charge Late Fees

Critical Message
Expires On

Default New Sub-Accounts to Bill to Master Account

Save Close

Sub Account

Customer Setup 11972-35

Customer # 11972-35
Customer Name Finast
Additional Name
Finast
576 W Lakeside Ave
Cleveland, OH 44110

Setup Information | New Field | Bill To | Master Account Setup | Items

Customer Status ANR
Customer Type Commercial
Old Customer ID
Terms Due On Receipt
Tax Exempt #
OK to Increase
Salesperson Matt Miller
Commission Pctg 0.00

Blanket P.O.
P.O. Expire Date
Customer Since 12/3/1990
Chain Account
Customer Group 01
Customer Group 2 MI
Branch MI
No Collections
Part Pricing Level None

Master Account Information
Master Acct: 11972
Finast

Invoice Printing
☒ Print Cycle Invoices
☒ Print Statements
☒ Print Site Info on Invoices
☐ Separate Cycle Invoice for Each Site
☒ Charge Late Fees

Critical Message
Expires On

All Sub Account Invoices Billed to Primary Master

Save Close

Inventory

Parts Query Builder

The following fields have been added to the Parts Query Builder:

Transfers	Trans_Part_Qty_Requested
Transfers	Trans_Part_Serial_Number
Transfers	Trans_Part_Lot_Number
Transfers	Trans_Part_Qty_Received
Transfers	Trans_Part_Memo
Transfers	Trans_Request_Number
Transfers	Trans_Request_Date
Transfers	Trans_Requested_By
Transfers	Trans_In_Process_Date
Transfers	Trans_In_Process_User
Transfers	Trans_Shipped_Date
Transfers	Trans_Shipped_User
Transfers	Trans_Received_On
Transfers	Trans_Received_By
Transfers	Trans_Whse_From_Code
Transfers	Trans_Whse_From_Desc
Transfers	Trans_Whse_To_Code
Transfers	Trans_Whse_To_Desc
Transfers	Trans_Memo
Transfers	Trans_For_Job
Transfers	Trans_For_Service
Journal	Journal_Id

Jobs

Bill To

A new button has been added which enables users to select which Bill To address should be used on job invoices. The default entry is the Bill To address marked as the primary Bill To for jobs. When this is changed to a different Bill To address on the customer record, the invoice will contain the updated information. The Bill To address in the job heading, however, will remain the primary Bill To address assigned for jobs.

The screenshot displays the 'Job - 1208 (Bakers Best Pie Co.)' window. The top section shows job details:

Job	Customer 5365	Site
Job Number: 1208	Bakers Best Pie Co.	Bakers Best Pie Co.
Job Type: Fire-Com	375 Park Ave	375 Park Ave
Job Status: Scheduling	Canton, MI 48188	Canton, MI 48188
System: 5365 Fire	(734) 289-6701	(734) 289-6701
Labor Units: 0 (9 Used)		

The 'Bill To' section is highlighted in the sidebar. The main area shows a list of addresses with a red arrow pointing to the selected address:

- Traverse City Pie Group
- 6987 Ford Road
- Canton, MI 48187

Below the address list is a 'Contact' dropdown menu and an 'Apply' button.

Last Revised: May 12, 2016

Commissions

The default date for posting of a commission has been changed to “today’s date” instead of the date that the job was sold:

The screenshot displays the 'Commissions' window for Job 1229. The window is divided into several sections:

- Job Information:** Job Number 1229, Job Type Fire-Com, Job Status Scheduling, System 47730 Intrusion, Labor Units 0 (0 Used). Customer 47730, Site Wok This Way, 567 North Canton Road, Canton, MI 48187.
- Commissions Section:**
 - Commissionable / Splits:** Install Total 3000.00, Commissionable % 100.00, Commissionable 3000.00, Recurring 0.00. Salesperson 1: Madison, Morrison (100.00%), Salesperson 2: (0.00%).
 - Table:**

Salesperson	Commission Type	Post Date	Commissionable	Rate	Commission
Madison, Morrison	GP	4/11/2016	0.00	2.00	0.00
 - Bottom Section:** Salesperson: Madison, Morrison, Commission Type: GP, Posting Date (GL): 4/11/2016, Commissionable: 0.00, Rate: 2.00, Commission: 0.00. Buttons: Apply, New, Delete.

Costing

A new variance column has been added to the Costing tab. This will show the dollar variance between the estimated and actual costs.

Job - 1208 (Bakers Best Pie Co.)

Job Information:
 Job Number: 1208
 Job Type: Fire-Com
 Job Status: Scheduling
 System: 5365 Fire
 Labor Units: 0 (3 Used)

Customer: 5365
 Bakers Best Pie Co.
 375 Park Ave
 Canton, MI 48188
 (734) 289-6701

Site:
 Bakers Best Pie Co.
 375 Park Ave
 Canton, MI 48188
 (734) 289-6701

Costing

Estimated | **Actual** | **Variance** | **WIP**

Category	Estimated	Actual	Variance
Income			
Install Charge	\$2,000.00	\$2,000.00	\$0.00
Change Orders	\$0.00	Hold Back: \$0.00	\$0.00
Costs			
Parts	\$1,000.00	\$998.51	\$101.49
Labor	\$500.00	\$450.00	\$50.00
Overhead	\$0.00	\$0.00	\$0.00
Permits_Fees	\$30.00	\$25.00	\$5.00
Freight	\$15.00	\$14.00	\$1.00
Equipment Rental	\$0.00	\$0.00	\$0.00
Other	\$0.00	\$0.00	\$0.00
Sub Total	\$1,545.00	\$1,387.51	\$157.49
Sub Profit/Loss	\$455.00 23%	\$612.49 31%	(\$157.49)
Commissions	\$200.00	\$200.00	\$0.00
Total	\$1,745.00	\$1,587.51	\$157.49
Profit/Loss	\$255.00 13%	\$412.49 21%	(\$157.49)

WIP (Work in Progress)

Material 1	\$0.00
Material 2	\$0.00
Labor	\$0.00
Permits_Fees	\$0.00
Freight	\$0.00
Equipment Rental	\$0.00
Overhead	\$0.00
Commissions	\$0.00
Other	\$0.00
Total WIP	\$0.00

Recurring

Est	
Job RMR	\$25.00
Act	
Activated RMR	\$25.00

Job Costing Summary:
 Installs: \$2,000.00
 Recurring: \$25.00
 Materials: \$0.00

☐ Include WIP Amounts

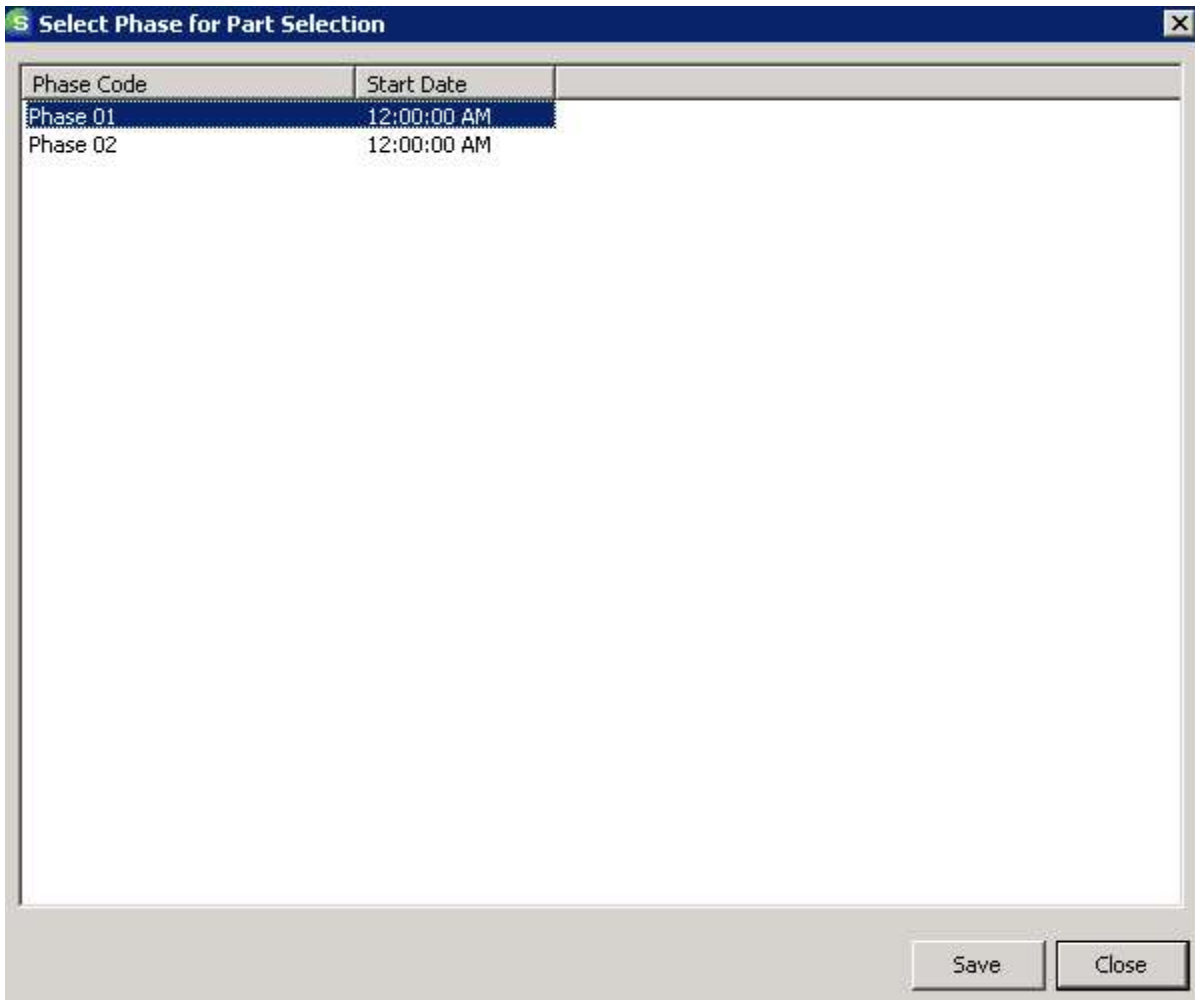
Job Query Builder

The following fields have been added to the Jobs Query Builder:

Labor_Task	Labor_Task_Est_Units
Labor_Task	Labor_Task_Est_Cost
Labor_Task	Labor_Task_Phase_Code
Labor_Task	Labor_Task_Phase_Desc

Purchase Orders

When more than one phase exists on a job, a new box entitled “Select Phase For Part Selection” will appear when creating a PO within the job.

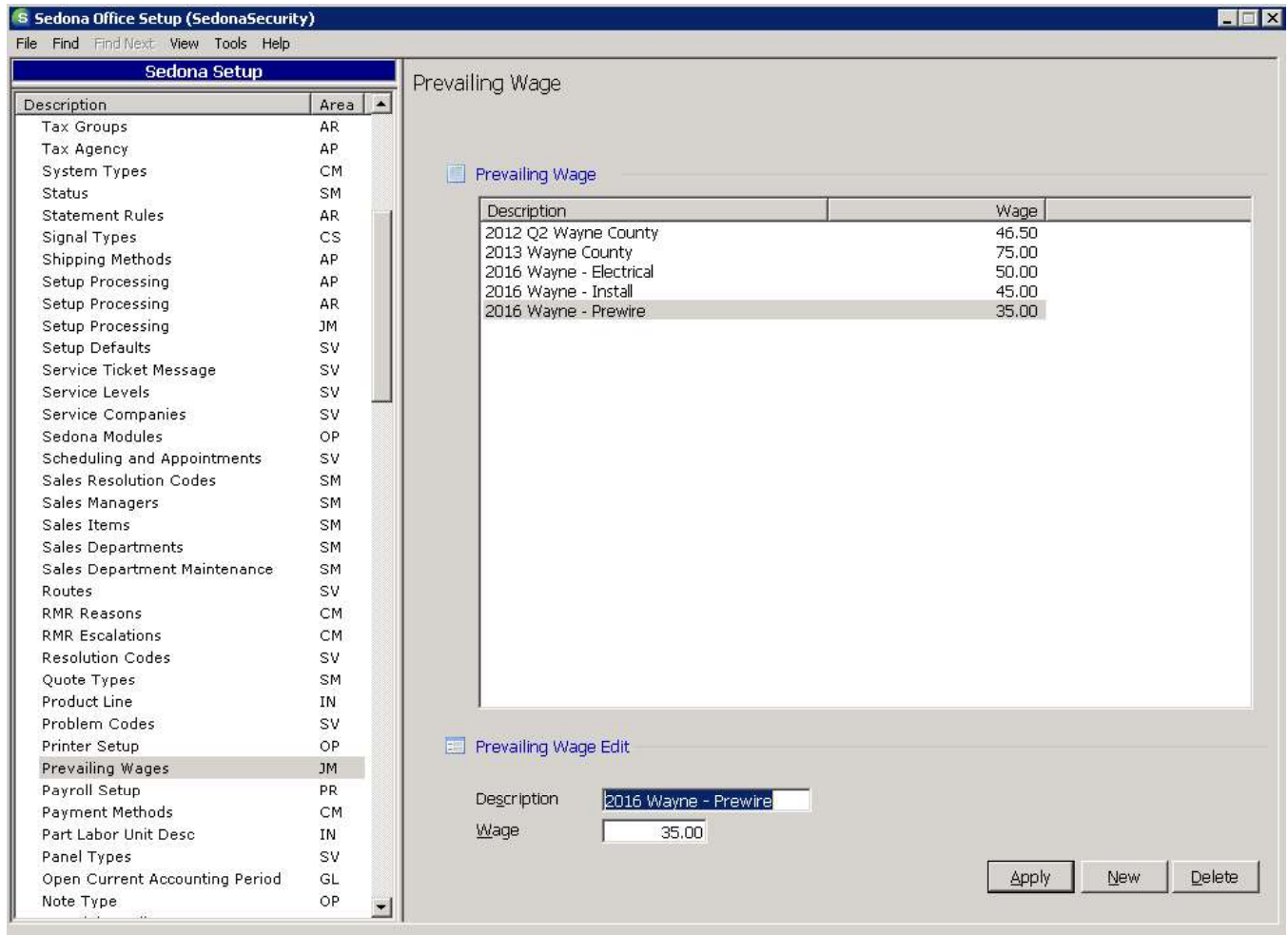


Phase Code	Start Date
Phase 01	12:00:00 AM
Phase 02	12:00:00 AM

This enables additional quantities of the same parts ordered within the main job to be re-ordered again **under a different phase code** in the Change Order. Using a different phase code on the Change Order prevents the user from receiving an error indicating that all parts had previously been ordered from the vendor.

Prevailing Wages

It is now possible to assign a different prevailing wage to each technician when entering their timesheets **manually** on a job. The Prevailing Wage table within Sedona Setup must be updated to show each type of prevailing wage that could be applied to a technician's timesheet.



When timesheet information is entered, it is possible to select a specific prevailing wage rate to apply to an employee's time based on the type of work performed. To select which prevailing wage to apply to a timesheet, press the button adjacent to the Pay Rate field. This will open the Prevailing Wage table from which the appropriate rate may be selected.

The screenshot displays the SedonaOffice interface for Job 1167 (Majors Rv). The main window shows job details and a Time Sheets table. A 'Prevailing Wage' dialog box is open, showing a list of wage rates. A blue arrow points from the button next to the Pay Rate field in the timesheet entry form to the dialog box.

Work Date	Installer	Job Task	Description	Labor Task	Units	Pay Rate	Amount
2/10/2016	Mack Knife	Sch Prewire	2016 Electrical ...	PW	8.00	50.00	400.00
						25.00	25.00

Description	Wage
2016 Wayne County	46.50
2013 Wayne County	75.00
2016 Wayne - Electrical	50.00
2016 Wayne - Install	45.00
2016 Wayne - Prewire	35.00

Time Sheet Entry Form:

Date: 2/10/2016
 Installer: Mike Walker
 Job Task: Prewire
 Labor Task: [Dropdown]
 Units: 1
 Pay Rate: 46.50
 Amount: 46.50

Buttons: Add, Clear, Delete

Report Manager

Australian GST*

This is a custom report written for a specific customer according to their specifications. The example below assumes GST calculations at 10%. Users may select the GST tax rate at the time that this report is run. This report uses user defined vendor checkbox 1 which has been defined as "International.". When a checkmark is not in placed in the International box, the following groupings apply:

C1 is taxable line items to a Fixed Asset account type.

C2 is non-taxable line items to a Fixed Asset account type.

P1 is all taxable line items that are to an account type other than Fixed Asset.

P2 is all non-taxable line items that are to an account type other than Fixed Asset

When a checkmark is placed in the International box, all transactions for that vendor go into a P1 grouping which is not taxable regardless of the GST flag at the line item level.

11/5/2016

Australian GST Report

SedonaSecurity

May 2016

Group	Register Number	Posting Dt	Vendor	Doc Dt	Doc Number	Base Amt	Tax Amt
C1	608882	5/11/2016	American Profit Recover	5/11/2016	7245	0.00	0.00
C1	AU Capital Purchase - GST Liabile					0.00	0.00
C2	608884	5/11/2016	Staples Inc.	5/11/2016	2345	2,250.00	0.00
C2	AU Capital Purchase - GST Exempt/GLS Free					2,250.00	0.00
P1	608881	5/11/2016	Amazon.Com, Llc	5/11/2016	AB238	650.00	65.00
P1	AU Purchase - GST Liabile					650.00	65.00
P2	607231	5/1/2016	Staples Inc.	5/1/2016	9854	6.25	0.00
P2	607206	5/1/2016	Liberty Power	5/1/2016	Super Bill	10.00	0.00
P2	608882	5/11/2016	American Profit Recover	5/11/2016	7245	50.00	0.00
P2	607275	5/13/2016	A+ Cleaning Services	5/13/2016	prepaid	70.00	0.00
P2	AU Purchase - GST Exempt/OLS Free					136.25	0.00
PI	608800	5/9/2016	Supermedia, Llc	5/9/2016	PS1264	275.00	0.00
PI	608801	5/9/2016	Supermedia, Llc	5/9/2016	PS9845	375.00	0.00
PI	608880	5/11/2016	Supermedia, Llc	5/11/2016	A0467	395.00	0.00
PI	AU Purchase - Import					1,045.00	0.00

Closed Service Ticket Cost*

This is a custom report written for a specific customer according to their specifications. Modifications to this report have been made at the report owner's request. When this report is grouped by technician, the name of the service company will now be included next to the technician's name. This separates the technicians when there are tickets handled by third party service providers. The "hide inactive routes" box should not be checked when running this report. This report may now be exported to Excel.

Closed Service Ticket Cost – Not Invoiced*

This is a custom report written for a specific customer according to their specifications. Modifications to this report have been made at the report owner's request. When this report is grouped by technician, the name of the service company will now be included next to the technician's name. This separates the technicians when there are tickets handled by third party service providers. . The "hide inactive routes" box should not be checked when running this report. This report may now be exported to Excel.

Open Service Ticket Cost*

This is a custom report written for a specific customer according to their specifications. Modifications to this report have been made at the report owner's request. When this report is grouped by technician, the name of the service company will now be included next to the technician's name. This separates the technicians when there are tickets handled by third party service providers. This report may now be exported to Excel.

Service Sales History*

This is a custom report written for a specific customer according to their specifications. Modifications to this report have been made at the report owner's request. This invoice item column will now display the part code when applicable. The formatting on the page header has also been modified.

Service Audit Export*

This is a custom report for a specific customer that does not have a printable report. All information is exported to Excel. This report now has the ability to include non-inspection tickets.

Report Options

The screenshot shows the 'Service Ticket Audit' dialog box. The 'General' tab is selected. Under 'Accounting Period', there are two dropdown menus, both showing '2 2/1/2016 - 2/29/2016'. Under 'Dates', there are two empty text boxes. On the right, the 'Options' section has 'Future Inspections' and 'Existing Tickets' (selected). Below this, another 'Options' section has 'Include Non-Inspection Tickets' checked and highlighted with a blue border. Below that is a 'Sort By' dropdown menu. At the bottom are 'Info', 'Export', and 'Cancel' buttons.

The fields Scheduled For and Last Technician were added to the export. When the existing ticket option is selected, the report now makes selections based on the Scheduled For field instead of the Created Date.

Service Commission Report*

This is a custom report that is designed for a specific customer's commission policy. It is unlikely that this report will fit the needs of any SedonaOffice customer other than the one which requested it to be written. It does not have a printable version and exports to Excel. This report now includes a notes field as well as the usercode of the individual that created the invoice. Credit will show only for the technicians selected. .

SedonaScheduler

Part Descriptions

It is now possible to overwrite the description of a part on a service ticket and have that new description appear on an invoice.

Ticket #3773

Ticket Central Station

Service Ticket Custom Fields Appointments and Labor Billing Documents (0) **Equipment and Parts** Journal Notes (0) Other Items Purchase Orders (0) Service History Ticket Log Ticket Group

Parts covered by contract
COGS Account: 520001

Notifications

Customer 12769
Our Lady Of Victories
Site Our Lady Of Victories
148 Spring Street
Cleveland OH 48105
Eastern Time

Created 3/15/2016 8:58 AM
Created By Administrator
Status Open

Contact
Phone
Ext
Notify

Customer Equipment Detail					Installed				Removal	
Part	Description	Qty	Location	Local Zone	Date	Type	Desc	Serial-Lot	Date	Remove

Service Ticket Parts										
Stock	Warehouse	Part	Description	Location	Qty	Unit Price	Total Price	Est Tax	Costing	Serial
* [x]	Main-MI	016105X320	Custom Description For This Part		1	281.0100	281.01	21.78	Standard	

New Save

The screenshot displays the 'Invoice' form in SedonaOffice. The form is divided into several sections:

- Header Section:** Includes fields for Customer ID (12769), Category (SVC Cont), A/R Account (110110), and Tax Group (OH-Cuyahoga County).
- Invoice Information:** Invoice # 334219, Invoice Date 3/29/2016, Aging Date 3/29/2016, Branch OH, Warehouse OH, Invoice Type Service, and Ticket # 3773.
- Customer Address:** Our Lady Of Victories, 148 Spring Street, Cleveland, OH 48105.
- Items Section:** A table titled 'Part List' with columns: Part, Description, Qty, Unit Rate, and Amount. The first row shows Part 016105X320, Description 'Custom Description For This Part' (highlighted with a red box), Qty 1, Unit Rate 281.01, and Amount 281.01.
- Summary Section:** Sub Total 346.01, Tax 26.82, Total 372.83, and Balance Due 372.83.
- Footer Section:** Includes checkboxes for 'Complete' and 'Add to Print Queue', and buttons for 'Invoice List', 'EFT', 'Save', and 'Close'.

Service Tickets

The following service ticket forms have been updated to support the new service ticket part description override:

S01, C06, C08, C09, C11, C12, C13, C14, and C15

Service Ticket Custom Form 13

This service ticket format now displays a PO for labor on vendor service tickets. The notes on this ticket format now print in ascending order.

Service Ticket Queue Field Chooser

The following fields have been added to the Field Chooser:

Created By

User Table 4

User Table 5

User Table 6

User Table 7

User Table 8

Schedule Board

The month and day now display below each technician's name for US installations

Calendar		[Investigator]	Mark Kofke	Mark Taylor	Dawn Smith	Mitchell Mulloy	Mike Walker	Miron Monic	Madison Morrison
February 2016	March 2016	2/15	2/15	2/15	2/15	2/15	2/15	2/15	2/15
S M T W T F S	S M T W T F S	12 am							
1 2 3 4 5 6	1 2 3 4 5	1:00							
7 8 9 10 11 12 13	6 7 8 9 10 11 12	2:00							
14 15 16 17 18 19 20	13 14 15 16 17 18 19								
21 22 23 24 25 26 27	20 21 22 23 24 25 26								
28 29	27 28 29 30 31								

Unscheduled Ticket Grid

A ticket creation column has been added to the Unscheduled Ticket Grid.

Calendar	[Unassigned]	Mack Knife	Mark Taylor	Dave Smith	Mitchell Maloy	Mike Walker	Milton Morris	Madison Morrison
February 2016 S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29	2/16	2/16	2/16	2/16	2/16	2/16	2/16	2/16
March 2016 S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31								
View: All								
City: Problem: Type: Created: Refresh								
anton Camera INSP 12/01/2015								
oncord Add Equ... INSP 12/01/2015								
leveland Insp-Fre... INSP 12/04/2015								
etotol Insp-Fre... INSP 12/15/2015								
anton Insp-Fre... INSP 12/15/2015								
etotol Insp-CC... INSP 12/15/2015								
ymouth Camera TKT 12/18/2015								
anton Add Equ... TKT 12/23/2015								
oncord Camera TKT 12/24/2015								
oncord AC Pow... TKT 12/24/2015								
anton AC Pow... TKT 01/07/2016								
anton Can't Set... TKT 01/07/2016								
leveland Can't Set... TKT 01/12/2016								
ymouth AC Pow... TKT 01/13/2016								
leveland Camera TKT 01/25/2016								
ansing Add Equ... TKT 02/01/2016								
ansing Camera TKT 02/01/2016								
ansing Download TKT 02/01/2016								
ansing Camera TKT 02/01/2016								
leveland Insp-Acc... INSP 02/02/2016								
leveland Insp-Acc... INSP 02/02/2016								
etotol Can't Set... TKT 02/03/2016								
hagin F... Add Equ... TKT 02/03/2016								
anton PM TKT 02/03/2016								
ansing Add Equ... TKT 02/03/2016								
ymouth Add Equ... TKT 02/11/2016								
etotol Add Equ... VEN 02/13/2016								
etotol Camera TKT 02/13/2016								
etotol Add Equ... VEN 02/13/2016								
leveland Add Equ... TKT 02/13/2016								
anton Add Equ... VEN 02/15/2016								

SedonaSetup

User Groups Table

A new permission has been added to the Usergroup table to terminate inspections.

The screenshot shows the Sedona Office Setup (SedonaSecurity) window. On the left is a list of setup items with their respective areas. The 'User Groups' item is selected. The main window displays the 'User Groups' table with columns for Group, Description, Level, and Credit Limit. Below this table are checkboxes for 'Include Inactive' and 'User Group Edit'. At the bottom, there are fields for 'Code', 'Description', 'Level', and 'Credit Memo Limit'. The 'Access' tab is selected, showing a list of permissions with checkboxes. The 'Access to Terminate Inspections' permission is checked and highlighted. Other permissions include 'Accounts Receivable', 'Credit Request', and 'Credit Memo'.

Group	Description	Level	Credit Limit
Dealers View	Dealers View with Notes	1	\$0.00
Inventory Clerk	Inventory Clerk	2	\$0.00
Manager	Manager	3	\$1,000.00
No Schedule Board	No Schedule Board	2	\$0.00
Phillips Sales Rep	Sales Rep	3	\$1.00
POS Administrator	POS Administrator	1	\$0.00
Service	Service	2	\$0.00
Team Leader/Install	Team Leader/Install	2	\$0.00

Code	Description	Level	Credit Memo Limit
Administrator	Administrator	3	\$10,000.00

Access	Module
<input type="checkbox"/> Site Items	CM
<input type="checkbox"/> Site Transfer	CM
<input type="checkbox"/> System Custom Fields	CM
<input type="checkbox"/> System Documents	CM
<input type="checkbox"/> Client Management Reports	CM
<input type="checkbox"/> Central Station Tracking Data	CM
<input type="checkbox"/> Access to Complete Cancellations	CM
<input type="checkbox"/> Access to Add/Edit Inspections	CM
<input type="checkbox"/> Access to RMR Escalations	CM
<input checked="" type="checkbox"/> Access to Terminate Inspections	CM
<input type="checkbox"/> Accounts Receivable	AR
<input type="checkbox"/> Credit Request	AR
<input type="checkbox"/> Credit Memo	AR

Two new applications have also been added to the User Groups Table. Users who will need access to SedonaDashboard (installed separately by Sedona Support) should have a checkmark placed into this box.

Sedona Office Setup (SedonaSecurity)

File Find Find Next View Tools Help

Sedona Setup

Description	Area
Warranty Types	SV
Warehouses	IN
Vendors	AP
Vendor Types	AP
Users	OP
User Groups	OP
User Defined Table4	SM
User Defined Table3	SM
User Defined Table2	SM
User Defined Table1	SM
User Defined Setup	SM
UL Grade	CS
Type Of Customer	CM
Transmission Format	CS
Terms	AP
Terms	AR
Technicians	SV
Tax Tables	AR
Tax Groups	AR
Tax Agency	AP
System Types	CM
Status	SM
Statement Rules	AR
Signal Types	CS
Shipping Methods	AP
Setup Processing	AP
Setup Processing	AR
Setup Processing	JM
Setup Defaults	SV
Service Ticket Message	SV
Service Levels	SV
Service Companies	SV
Sedona Modules	OP
Scheduling and Appointments	SV
Sales Resolution Codes	SM
Sales Managers	SM

User Groups

☐ User Groups

Group	Description	Level	Credit Limit
Accounting Clerk	Accounting Clerk	2	\$5,000.00
Admin	Admin	3	\$100.00
Administrator	Administrator	3	\$10,000.00
AP Query Only	AP Query Only	1	\$0.00
Data Entry Job	Data Entry Job	1	\$1.00
Dealers	Dealers	2	\$0.00
Dealers View	Dealers View with Notes	1	\$0.00
Inventory Clerk	Inventory Clerk	2	\$0.00
Manager	Manager	3	\$1,000.00

☐ Include Inactive

☒ User Group Edit ☐ Inactive

Code Description Level Credit Memo Limit

Administrator Administrator 3 \$10,000.00

Application Access Report Access

Access	Module
<input type="checkbox"/> Unlock Users	CM
<input type="checkbox"/> Management Summary	MS
<input checked="" type="checkbox"/> SedonaDashboard	SS
<input type="checkbox"/> Report Manager	RM
<input type="checkbox"/> SedonaSetup	SS
<input type="checkbox"/> Accounts Payable Tables	SS
<input type="checkbox"/> Shipping Methods	SS
<input type="checkbox"/> Terms	SS
<input type="checkbox"/> Vendor Types	SS
<input type="checkbox"/> Accounts Receivable Tables	SS
<input type="checkbox"/> Alternate Address	SS
<input type="checkbox"/> Bank	SS
<input type="checkbox"/> Branches	SS

Print Apply New Delete

A button has also been added to the table for Sedona Email (an application under development for future release). Users should not be given access to SedonaEmail at this time.

Sedona Office Setup (SedonaSecurity)

File Find Find Next View Tools Help

Sedona Setup

Description	Area
Warranty Types	SV
Warehouses	IN
Vendors	AP
Vendor Types	AP
Users	OP
User Groups	OP
User Defined Table4	SM
User Defined Table3	SM
User Defined Table2	SM
User Defined Table1	SM
User Defined Setup	SM
UL Grade	CS
Type Of Customer	CM
Transmission Format	CS
Terms	AP
Termin	AR
Technicians	SV
Tax Tables	AR
Tax Groups	AR
Tax Agency	AP
System Types	CM
Status	SM
Statement Rules	AR
Signal Types	CS
Shipping Methods	AP
Setup Processing	AP
Setup Processing	AR
Setup Processing	JM
Setup Defaults	SV
Service Ticket Message	SV
Service Levels	SV
Service Companies	SV
Sedona Modules	OP
Scheduling and Appointments	SV
Sales Resolution Codes	SM
Sales Managers	SM

User Groups

☐ User Groups

Group	Description	Level	Credit Limit
Accounting Clerk	Accounting Clerk	2	\$5,000.00
Admin	Admin	3	\$100.00
Administrator	Administrator	3	\$10,000.00
AP QQuery Only	AP QQuery Only	1	\$0.00
Data Entry Job	Data Entry Job	1	\$1.00
Dealers	Dealers	2	\$0.00
Dealers View	Dealers View with Notes	1	\$0.00
Inventory Clerk	Inventory Clerk	2	\$0.00
Manager	Manager	3	\$1,000.00

☐ Include Inactive

☐ Inactive

User Group Edit

Code	Description	Level	Credit Memo Limit
Administrator	Administrator	3	\$10,000.00

Application Access | **Report Access**

Access	Module
<input type="checkbox"/> Panel Types	SS
<input type="checkbox"/> User Table 3	SS
<input type="checkbox"/> User Table 4	SS
<input type="checkbox"/> Problem Codes	SS
<input type="checkbox"/> Resolution Codes	SS
<input type="checkbox"/> Service Companies	SS
<input type="checkbox"/> Service Levels	SS
<input type="checkbox"/> Service Routes	SS
<input type="checkbox"/> Technicians	SS
<input type="checkbox"/> Warranty Types	SS
<input type="checkbox"/> Company Edit	SS
<input checked="" type="checkbox"/> Email	EM
<input checked="" type="checkbox"/> Send Invoice	EM

Print Apply New Delete

Application Corrections

Accounts Payable

ADI Integration

Reported Issue: When placing drop-ship orders through ADI Integration, two lines of information were being passed to ADI (the name of the entity being drop shipped to as well as the name of the company placing the order). ADI was reading the Drop Ship To name as a blank. This resulted in an error correction which they made by substituting the name of the sending company as the drop ship to name. This issue has been corrected.

Bills

Reported Issue: When a bill was created by selecting bills under Accounts Payable, selecting a vendor, and subsequently selecting receipts, the screen did not enable a sort to be performed on the receipt column. This issue has been corrected.

Reported Issue: Entering negative dollar amounts on vendor bills (to show items such as restocking fees) was not being permitted. This issue has been corrected.

Reported Issue: Checkmarks were not staying in the GST tax box when a line item was subject to Australian GST tax, and the addition/removal of line items subject to Australian GST was causing the GST to incorrectly calculate. This issue has been corrected.

Check Remittance

Reported Issue: When a bill was selected for payment, and subsequently removed from payment prior to printing the check, the remittance form printed the invoice number at \$0.00. The bill will no longer be shown on the remittance form.

PO Receipt

Reported Issue: When a checkmark is in the box in the AP setup table to have all job and service tickets direct expensed, and a receipt for a job is received in as Receive and Issue Immediately, the part was received to the warehouse but never issued to the job. This issue has been corrected.

Receiving An Expense Only PO

Reported Issue: Users received the error "User Front End Stopped Working" when attempting to receive an expense only receipt with a checkmark marked to create a bill now for a job or service ticket. This issue has been corrected.

Vendor Return Receipts

Reported Issue: Printing a vendor return caused the following error to appear “A problem was encountered in Receipt xxx. Terminating print batch.” This issue has been corrected.

Reported Issue: User attempting to save a Vendor Return at the same time as creating a vendor credit received the error message “Error While Saving Receipt. 9 Subscript out of range.” This issue has been corrected.

Accounts Receivable

Deposits

When a \$25,000,000 deposit was made, the correct amount appeared on the deposit report, but the list of deposits showed it as -\$21,474,836.48. This issue has been corrected.

EFT Processing – Non-Recurring Items

Reported Issue: The routine generating the amount to authorize was not taking into account multiple unposted payments for less than the amount of the invoice. When the non-recurring button was pressed, the incorrect balance for the invoice was displayed. This issue has been corrected.

Invoices

Reported Issue: Service ticket invoice charges were being added to recurring invoices (through the Add to Next Cycle feature in the service ticket) with a quantity of 0 and rate of \$0.00 but the correct total of the invoice. This caused runtime errors to appear when credit requests were created to credit off the invoice. Invoices will now show a quantity of 1 with a rate and total to prevent this from happening.

Payment Processing

Reported Issue: Tabbing through the Payment Processing screen caused skipped over the Memo line. This issue has been corrected.

Client Management

Cancellation Queue

Reported Issue: Leading zeros in a customer number were being dropped in the display of the customer number in the cancellation queue. This issue has been corrected.

Copy Site From

Reported Issue: The copy site from box presented an option to move selected documents from the original site to the destination site but never produced a box for the user to select specific documents. The user will be presented with the list of documents from which to make a selection after the site has been copied. This will happen after entering information into the Sedona Event dialog box.

Inspections

Reported Issue: When an inspection record had been marked to increment the next inspection date at any activity other than Ticket Close, the last inspection date was not populating correctly with the date that the technician was onsite. This issue has been corrected.

Notes

When you first go to General Notes for a customer system notes are not displayed. Once you add a note to the system, all general notes previously entered display. This issue has been corrected.

General Ledger

Bank Reconciliation

Reported Issue: When a \$25,000,000 deposit was made, the correct amount appeared on the deposit report, but the deposit appeared on the bank reconciliation appeared as -\$21,474,836.48. This issue has been corrected.

Inventory

Parts Detail

Reported Issue: The costing method for the part was not being displayed on the parts detail screen. This issue has been corrected.

Transfers

Reported Issue: The transfer order form allowed the warehouse to which the part was to be transferred to remain blank or contain the name of a warehouse that was not in existence. This issue has been corrected.

Vendor

Reported Issue: When a part had been given a vendor part number that exceeded 25 characters, the error message "9 Subscript Out of Range" appeared when the part was saved. An error message box has now been added alerting the user that they have exceeded the length of a vendor part number at the time that vendor information is added to the part.

Warehouses

Reported Issue: When a user went to the Inventory module and chose Warehouses from the main tree, it was not possible to sort the warehouses by the code column. This issue has been corrected.

Reported Issue: When a user selected Purchase Orders from Warehouses, the columns for Order Date and Due date were not sorting correctly. This issue has been corrected.

Jobs

PO Receipt

Reported Issue: A Runtime Error 91 – Other Variable Or With Block Variable Not Set was received when attempting to receive a PO on a job when a PO was not present. This issue has been corrected.

Reports

Deposit Check Summary

Reported Issue: This report only accommodated a 10 character customer number. This issue has been corrected.

GL Entries

Reported Issue: The drop-down box for GL Register Type only displayed “All Register Types.” This issue has been corrected to correctly display each type of GL Register type.

Job Sold

Reported Issue: Change orders were being included when the report was run and consolidate change orders was selected. If the report was run as unconsolidated, change orders were not being included. This issue has been corrected.

PO List

Reported Issue: The amount appearing in the billed column of this report was not displaying correctly. We have removed the column showing billed amounts on this report.

RMR Customer Detail

Reported Issue: The totals summary page of the RMR Customer Detail reports was not bringing in the correct total as calculated for monthly customers in the detail section of the report. This issue has been corrected.

Stock Used

Reported Issue: Stock Used Report was not generating a report when a range of dates was used. This issue has been corrected.

Sales Management

Adding a Prospect

Reported Issue: Outlook 2016 was not being recognized on a user's workstation when attempting to make an appointment. This issue has been corrected.

Opportunities Queue

Reported Issue: The Total RMR calculation was not being displayed at the bottom of the screen. This issue has been corrected.

Primary/Secondary Sources

Reported Issue: Users had to make a selection from the drop-down list and could not type in their selection. The field now enables a type-ahead feature to enable either selection by typing in the field or selecting from the drop-down list.

Prospect Queue

Reported Issue: It was not possible to sort on the # of Days or Follow Up columns. This issue has been corrected.

SedonaScheduler

Selecting A Bill To Address

Reported Issue: When a Bill To address was selected from the drop-down list on the billing tab, the name chosen did not appear on the invoice. When a customer has a primary Bill To address defined for service tickets, and the user attempts to modify that on a service ticket, a message will now appear indicating that the primary Bill To address must be removed before a new selection may be made.

Entering Labor On Jobs

When entering dispatch, arrival and departure times on jobs, the program was not checking to see if the accounting period was closed. This issue has been corrected.

Equipment and Parts

Reported Issue: Closing a service ticket with parts listed with 0 quantity in the Equipment and Parts tab caused the part to be added to the customer's equipment list. This issue has been corrected.

Reported Issue: When a serialized part was replaced on a service ticket using drag and drop, the part was immediately taken out of service. In 5.7.30, when a serialized part is replaced, it will immediately return to the warehouse.

Reported Issue: When a 2 of the same serialized part were ordered on a PO outside of the service ticket and direct expensed, only the first serialized part was showing on the Equipment and Parts tab even though both had been marked as received in the Parts Detail within the Journal tab. This issue has been corrected.

Printing A Service Ticket

Reported Issue: When there were different periods offered under warranty for parts, labor and other, the correct information would appear in the Warranty section of the service ticket when viewed online, but the printed service ticket only displayed the end date of the labor warranty period. The service ticket will now display the warranty code instead of an end date when different warranty periods are offered and any portion of that warranty remains active.

SedonaSetup

Reported Issue: The Users List was not presenting the highlighted user information when the arrow key was used to scroll through the list. This issue has been corrected.