

SedonaAPI and SedonaWeb 2.0 - 1.42.0 - 9/14/2022

01/05/2024 12:11 pm EST

Enhancements/Features

30429 Ensure role group permissions are applied correctly

Verified that SedonaAPI controllers are applying permissions correctly and updated permissions to match Sedona-X Mobile roles.

21695 Customer Portal Features

There are changes to the Customer Portal that allow company-level users to specify which functionality is available to customer-level users when they log in to the Customer Portal. The functionality is specified by new preferences with names that begin with "Customer Portal". These are the preferences that can be enabled or disabled (by default, all of these are enabled):

- Site Listing - Ability to allow or disable access to the site listing page
- RMR - Ability to allow or disable access to the RMR listing page. If access is disabled, need to ensure users cannot view RMR from a site/system either
- Invoices - Ability to view or prohibit viewing invoice details when opening the invoice
- Payments -
 - Ability to allow or disable add/edit/remove payment methods
 - Ability to view or prohibit viewing payment history
 - Ability to pay or prohibit paying invoices
- Service -
 - Ability to access or block access to the service area of the portal
 - Ability to view or prohibit viewing service ticket details by opening service tickets
 - Ability to create or prohibit creating service tickets
- Documents - These feature flags apply to the main documents area controlling the documents associated with the customer, as well as any documents that pertain to sites or systems
 - Ability to access or block access to documents within the portal
 - Ability to upload or prohibit uploading documents

These settings are on the Company Preferences:

Company/Branch Preferences

Branch

Company Preferences ▼

Drag a column header and drop it here to group by that column

Name	Description	Value
Customer Portal - Create Service Tickets	Customer Portal - create a new service ticket	true
Customer Portal - Documents	Customer Portal - access Documents	true
Customer Portal - Invoices	Customer Portal - access Invoices	true
Customer Portal - Pay Invoices	Customer Portal - pay invoices	true
Customer Portal - Payment History	Customer Portal - access Payment History	true
Customer Portal - Payment Methods	Customer Portal - access Payment Methods	true
Customer Portal - RMR	Customer Portal - access RMR	true
Customer Portal - Site Listing	Customer Portal - access Site Listing	true
Customer Portal - Upload Documents	Customer Portal - upload Documents	true
Customer Portal - View Service Ticket Details	Customer Portal - view service ticket details	true

1 2 3 4 5 ... 10 items per page

Company/Branch Preferences

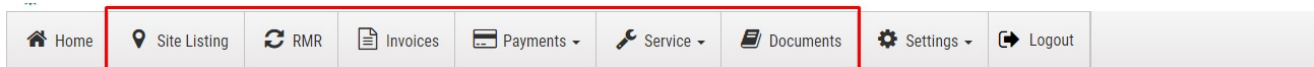
Branch

Company Preferences ▼

Drag a column header and drop it here to group by that column

Name	Description	Value
Customer Portal - View Service Tickets	Customer Portal - view service tickets	true

These settings correspond to the menu items:



Current Balance

\$15,369.60

[Make a Payment](#)

Last Payment: \$75.00
Received on: 10/7/2021
Amount Past Due: \$15,423.56

Service Tickets

You Have 1 Open Service Tickets

[View Open Tickets](#)

[Create Service Ticket](#)

Auto Bill Pay

Enrolled ☒

Next Payment on 03/01/2022

Paperless Billing

Enrolled ☒

The preferences also affect items displayed or selectable throughout the portal. For example, with all the permissions disabled, the home screen looks like this:

Current Balance \$15,369.60 Last Payment: \$75.00 Received on: 10/7/2021 Amount Past Due: \$15,423.56	Auto Bill Pay Enrolled ☒ Next Payment on 03/01/2022 Paperless Billing Enrolled ☒
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With the preferences disabled, the home screen is changed like this:

- When the Invoices permission is false, the current balance dollar amount no longer links to the open invoices.
- When the Pay Invoices permission is false, the Make a Payment button is gone.
- When Create Service Tickets and View Service Tickets permissions are false, the entire Service Tickets box is gone.
- When the Payment Methods permission is false, users cannot change enrolled status of the Auto Bill Pay field. Enrolling takes the user to the payment methods to choose which one to use for autopay.
- When the Pay Invoices permission is false, users cannot change the enrolled status of the Paperless Billing Enrolled field.

There is an existing host-level preference for creating service tickets. Both company and host preferences must be enabled to create a service ticket. If the host preference is disabled, the company preference is ignored, and service tickets cannot be created in any company.

The Customer Portal has these other changes:

- Corrected several forms that had an incorrect title displayed in the browser tab.
- Corrected the invoice details item list table. Changing pages refreshes the items and properly displays the selected page.
- Changed payment history to include invoice payments only. (Formerly it was showing all payment types)
- Changed payment detail screen to show the correct information.
- Resolved an issue with adding bank accounts if the customer's name was more than 22 characters.
- Resolved an issue with adding a master account credit card through the portal that caused a not found message after submitting the credit card information.

Corrected Bugs (Application Corrections)

Development ID	CRM ID	Resolved Issue
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Development ID	CRM ID	Resolved Issue
28998	INTERNAL	SA Parts sync endpoint not returning correct parts list for 'Available for Sales' = false Fixed the repository query to add the correct WHERE clause when the incoming request is for 'Not Sales Part' part records.
29812	INTERNAL	/api/app/customers POST not populating Customer Bill email Changed the post payload to customer entity model mapping to populate the new customer bill to model with the email from the post payload.
29964	56302	New Payment Processing DLLS for Capture Transaction fix Resolved issues capturing transactions for payment processing.

SedonaAPI

Development ID	CRM ID	Resolved Issue
23045	00031887	Sedona API allows Customer record to be created without sending the BranchID Changed the API to require the BranchID when creating a customer. Read this technical document for the changes to the API.
23046	00031871	Sedona API allows Term code 1 to be used Changed the API to use only valid Term codes. Read this technical document for the changes to the API.
23047	00031851	Sedona API allows NULL for Bill To Address Line 1 Changed the API to not create a bill to record and a customer record if the Bill To Address Line is missing. Read this technical document for the changes to the API.
23048	00030335	Sedona API POST api/customerbill returns 201 response when record is not created Changed the API response for the POST api/customerbill when a record is not created. Read this technical document for the changes to the API.
23625	00033268	State code not populated based on zip code ID sent Changed the API to populate the state code based on the zip code. Read this technical document for the changes to the API.
23997	00033270	API Allows NULL to be passed to Phone but that is not valid for the field and causes errors if you try to open the customer record in Sedona Changed the API to resolve the issue of the API passing NULL values that was causing errors with customer records in Sedona. Read this technical document for the changes to the API.
25390	INTERNAL	API - Post Customer Document with Job and System does not create document Changed a validation: the SedonaSystemId was being run regardless of whether or not it was required. Now if JobId is passed in, then the SedonaSystemId is ignored.
28014	00045654	Sedona-X Service Report Option Broken Resolved an issue with the Service Report that was causing the mobile app to crash.

Development ID	CRM ID	Resolved Issue
28897	50633	POST/Credit taxable request not returning taxed amount in 201 Response The API was updating the taxes; however, the database repository was not registering the tax update. To resolve this, the tax update changes are reloaded after they are calculated.
29379	00050914, 52450	Default role groups have changed what's assigned to them Corrected AspNetRoles: PATCH action was not accommodated - corrected. CustomerController template route was [controller] instead of Customer - corrected. Corrected endpoint processing to process endpoints only once per group, applying the endpoints to each instance of the group. Corrected route names by adding functionality to update the role description when the route name is changed in a controller. Added exclusion of endpoints that are hidden from public use. Found and corrected a problem caused by a change in June 2021 that could cause fixed role groups to erroneously have permissions removed upon SedonaCloud startup. Added permissions for fixed role groups Project Manager and Manager to: • Post Customer2 • Update Customer2 • Post CustomerBill2 • Update CustomerBill2 • Post CustomerSite2 • Update CustomerSite2 • Post CustomerSystem2 • Update CustomerSystem2
29556	54291	Customer Site update fails when using a 2-character State Abbreviation Changed the API to use the 2-character state abbreviation. Read this technical document for the changes to the API.
29979	00056283	API issue Customer Recurring does not allow negative Changed the API validation to allow a negative amount. The validation will display an error only if the amount is zero.

SedonaOffice

Development ID	CRM ID	Resolved Issue
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SedonaWeb

Development ID	CRM ID	Resolved Issue
25892	00024254	Sedona-X Mobile License Error Changed the API to only check the Sedona-X License number if the user was not already a Sedona-X Mobile user.
26643	00042385	SedonaCloud SedonaWeb Payment Confirmation Typo Corrected the spelling to "Payment successful!" on customer and master customer payment forms in SedonaWeb 2.0.

Development ID	CRM ID	Resolved Issue
29198	00052491, 52189, 54675, 54384, 45654	Service Report Generation crashes mobile app and does not generate or upload a pdf document. Resolved an issue that was crashing the mobile app and not generating a PDF document. This was happening when there was not a logo in the SedonaCloud company. Now the Service Report Generation generates and uploads a PDF document even if there is not a logo to use.
30122	00054140	Clients cannot create SedonaWeb users Resolved an issue that was preventing clients from creating SedonaWeb users. (Note: This requires an update to SedonaOffice 6.2.0.8.)

Special Upgrade / Install Instructions

If your company uses the SedonaCloud API, IT will update the SedonaCloud version at the same time as your SedonaOffice upgrade. This is to ensure compatibility with the modules utilizing SedonaCloud.

Supported Environments

- This version of SedonaAPI requires SedonaOffice version 6.2.0.8.
- Minimum System Requirements: Server is on Microsoft .Net 4.6.1