

SedonaOffice - 6.1.0.51

01/05/2024 4:33 pm EST

Special Upgrade / Install Instructions

If upgrading to SedonaOffice 6.0 and higher, the following related updates are also required:

FSU Updates - iOS devices must be on iOS version 11 or newer. Please also check the app store for any updates to your FSU app

SedonaWeb - If your company uses SedonaWeb, IT will update your SedonaWeb version at the same time as your SedonaOffice version.

This is to ensure the highest level of PCI compliance throughout all applications

SedonaCloud/SedonaAPI 2.0 Setup - If your company uses the SedonaAPI, IT will update your SedonaAPI version at the same time as your SedonaOffice version. This is to ensure compatibility with the SalesAutomation module.

If you are not a SedonaCloud customer, please review the requirements for the new API before requesting the update. For a copy of pre-install requirements please contact: sedonaoffice.support@boldgroup.com

Performing Update - Once you have reviewed all of the above information, and followed all preparation steps, contact SedonaOffice support. We will note on your account that you have received the Release Notes and are ready for update. SedonaOffice IT will then contact you to schedule your update.

Supported Environments

Minimum System Requirements:

- Server is on Microsoft .Net 4.6.1

Features

Forte SEC Code for ACH Transactions (13456)

Product: SedonaOffice

Description: As part of a new industry standard, ACH transactions require a Standard Entry Class code, or SEC code. This small feature was to add the SEC code to each ACH transaction submitted to Forte. For more information about SEC codes please visit [this website](#)

Add Logging to PCIComplianceUpdate (15013)

Product: SedonaOffice

Objective: This adds logging to the Forte service request and response when tokenizing accounts

Bugs

Inspection Ticket Date not Updating (9380)

Product: SedonaOffice

Issue: When a ticket was resolved, the Next Inspection Date was not updating

Solution: Ensured that when resolving a ticket, the Next Inspection date increments properly

Open Ticket Costing Report Routes Error (11942)

Product: SedonaOffice

Issue: Report needs to be corrected to compensate for people that have tried using routes and then turned it back off so some customers have routes and some don't. Right now the report can only read where all customers have routes or no customers have routes and gives bad data if it ever finds a customer that has had routes but currently does not

Solution: In SedonaSetup a new option, Disable Service Routes, has been added to the Service Setup Defaults. This option defaults to enabled, so users will see no difference in the operation of routes unless they change this setting. When service routes are disabled, the Disable_Routes column in the SY_Setup table will be set to 'Y'. Also, the Route_Id columns in the SY_System, SV_Service_Tech_Routes, and GE_Table3 tables will be cleared (i.e. set to 1). This will cause all new service tickets and inspections to be created without a default service route. If the "Remove Routes from Existing Data" check box is also checked, the Route_Id columns in the AR_Customer_System, SV_Inspections and SV_Service_Ticket tables will be cleared in of all existing records, and all routes will be deleted from the SV_Routes table

Customer Query Builder Critical Note Field Also Pulling System Critical Notes (11943)

Product: SedonaOffice

Issue: Customer Query Builder field Customer/critical_message is pulling in System/critical_message fields as well. We need to make sure that this field only pulls in the customer's critical messages

Solution: When querying for customer critical messages, exclude system critical messages

Report Control Limitation Issue (12004)

Product: SedonaOffice

Issue: List controls were limiting older reports from loading their entire results if the data set was past the limit

Solution: Updated the controls from the intrinsic VB list controls to a ListView control with a much higher item limit. These reports should now have no problems

EFT Processing Permission (12042)

Product: SedonaOffice

Issue: Users must have ability to send eft in order to be able to add credit cards and create live transactions. Customers should be able to assign everyday user to be able to create eft transactions without also giving them the ability to send them. Issue did not appear in prior versions due to the need for an FTP profile. But now anyone who has access to eft processing can send transactions to forte

Solution: Modified the EFT Processing permissions so the the new payment processing works the same as the old payment processing. This allows users with EFT Customer permission to add payment methods and to create EFT transaction, without giving them the full capabilities of EFT Processing

Cannot Write Off Vendor Returns (12450)

Product: SedonaOffice

Issue: When trying to write off a vendor return that was posted in a currently closed accounting period by saving with the 'No Bill/Credit Expected' checked, the journal entry that should be created for the return is not being created.

Solution: Ensured that the journal entry to write off the return is posted even when the return was posted in a currently closed accounting period

Commercial/Residential Swap (12452)

Product: SedonaOffice

Issue: When creating a customer, if the commercial/residential selection is different for the bill to and site, if you aren't careful creating the customer, it will auto switch the site to match the selection for the customer

Solution: Change the Site's Commercial/Residential type only when the site tab is first selected in the customer wizard

Trim Spaces From Account Numbers in EFT Processing (12935)

Product: SedonaOffice

Issue: Need to trim white space from EFT parameters, including credit card numbers, bank account numbers and routing numbers

Solution: Trimmed white space from bank routing numbers and account numbers

Unknown Error When Adding Already Existing Customer Document (12936)

Product: SedonaOffice

Issue: Receive unknown error trying to add doc to customer. Issue is doc is already on customer but error is too vague

Solution: When the SedonaDocuments stored procedure returns an error, return that error to SedonaOffice

Part Special Character Issues (12937)

Product: SedonaOffice

Issue: When adding new parts to SedonaOffice, special characters can be included in the part code, part description, part detail, vendor part code, vendor part description, and/or vendor part detail. These special characters cause various issues ranging in severity.

Sometimes they prevent users from being able to open the part at all. Sometimes they prevent the part from being edited, sometimes they prevent the part from being added to POs. Sometimes you can add the part to the PO, but then get an error when you receive it.

Sometimes the parts updater can't find the part. Sometimes the ADI integration can't read the POs we send them

Solution: Added validation of part code, description, etc for special characters before saving the part. An error message is displayed and the user is required to reenter the offending data

Error Handling for Reselect System on Job RMR Invoices (12938)

Product: SedonaOffice

Issue: Users get a generic error when trying to create job invoices with RMR on them because the invoice is trying to create the RMR line, which it cannot do because the job system is missing

Solution: When saving a job RMR invoice, check that the job system is valid and, if not, provide proper error handling to notify the user

Part Performance (12980)

Product: SedonaOffice

Issue: This issue was particularly affecting dealers that have a large number of parts in their database, which was causing issues with performance on functions that process parts

Solution: Moved a maintenance proc that was being called when the journal was added from being ran while processing parts, which reduced the performance load

Comdata Integration Vendor Issue (13365)

Product: SedonaOffice

Issue: The vendor connection between the two databases was not successful, causing many features to not function correctly. The logs for these errors were not functioning either, making it hard to pinpoint the exact issue

Solution: Resolved the logging issues and ensured that the Vendor Code length requirement matched between both databases so that SedonaOffice vendors can resolve with Comdata correctly

Job WIP Issue (13050)

Product: SedonaOffice

Issue: Due to the fact that users can edit items that are attached to closed jobs, closed jobs can get unresolved WIP due to the editing of the items attached to that closed job

Solution: Disabled editing and deleting of AP Bills, AP Checks, Part Receipts and Returns, and Job Part Issues if they are linked to a job that has been closed and has WIP amounts applied

SedonaOffice Manitou Integration Bug Fixes (Many Listed Below)

Product: SedonaOffice

Work Items Included: 13645, 13655, 13677, 13678, 13679, 13694, 13695, 13696, 13715, 13728, 13729, 13730, 13732, 13733, 13754, 13755, 13781, 13782, 14237, 14261, 14543

Issues: There were impediments blocking the SedonaOffice Manitou Integration from functioning properly and as intended.

Solution: These issues were identified through careful and extensive testing and addressed thoroughly

Fix Named Instance Server Connection Issues (14971)

Product: SedonaOffice

Issue: Many applications fail to connect to a named instance database

Solution: Fixed connection functions utilized by all applications to resolve the issue

Search Feature Crashes Application (12043)

Product: SedonaOffice

Issue: SedonaOffice crashes due to the Search feature being utilized. This is being caused due to a few things, most predominantly noticed when hitting 'enter' in the search feature

Solution: Implemented tests to find causes for the crash and added fixes for the found perpetrators

On Hand Inventory Value Calculation Issue (12996)

Product: SedonaOffice

Issue: If users had parts that were not assigned to a warehouse, then created a direct expense PO for that part, received the part as a direct expense to a job, returned the part from that job to stock in the warehouse that didn't already have the part assigned to it, the on hand quantity being calculated for that part in the warehouse would be doubled incorrectly.

Solution: Fixed the Part_Journal_ADD stored proc so that it won't update twice the on hand quantity and on hand value, if adding a new part to a warehouse.

Improper Ticket Parts Issue (13462)

Product: SedonaOffice

Issue: Under the following conditions the system will improperly issue parts to a service ticket by creating both a return and an issue, when it should only create an issue. Details in ticket 168794. Steps: Make sure wip is on for service parts in general service setup and make sure chosen service company is set to expense parts on service tickets. Create new ticket, using the chosen service company. Add parts to equipment tab marked to come from stock. When you save the parts will auto issue to the ticket. At this point our customer wait until a new month comes so that the gl and inventory issues become a part of a closed accounting period. To replicate this in testing we went into the data and changed the gl entry and inventory entry to reflect the previous month. Check to make sure the previous month is closed. Return to the ticket and uncheck the stock box on the part, the part will be auto removed from the ticket. This is correct. Now check the stock box again and save. The part will auto issue to the ticket again, and that is correct, but the return to stock will also suddenly double.

Solution: Modified stored procedure Service_Ticket_Part_UPD to not create a reverse journal entry if the part is not being taken from stock

Report Control Limitation Issue (12004)

Product: SedonaOffice

Issue: List controls were limiting older reports from loading their entire results if the data set was past the limit

Solution: Updated the controls from the intrinsic VB list controls to a ListView control with a much higher item limit. These reports should now have no problems

No Tracking for Card Deletion (13503)

Product: SedonaOffice

Issue: Customer event log no longer tracks when credit card are edited/deleted

Solution: We need to ensure that if a user edits or deletes a card on a customer in SedonaOffice, that edit or deletion gets tracked/logged in the customer event log

Cannot Make EFT Payment from Customer (13507)

Product: SedonaOffice

Issue: Users were experiencing an error when trying to pay an invoice from a customer

Solution: Fixed the registration of SedonaPaymentCom.dll on Compiler, which will ensure the ability to create payments on a customer

in SedonaOffice

Statement Spelling Typos (13692)

Product: SedonaOffice

Issue: The word 'Credit' was misspelled as 'Cedit' on custom statement C01

Solution: Fixed the misspelling of 'Credit'

ComData AP Checks Missing GL Account (13861)

Product: SedonaOffice

Issue: When creating AP checks using the ComData interface, AP checks were missing the account code, as well as the GL entry for them were missing an account code on the credit side

Solution: In the SComdata_PostPayment stored procedure, get the account code from the GL_Account table, rather than from the AR_Bank table. They may not be the same

American Express Eclipse Payment Batches Issue (14118)

Product: SedonaOffice

Issue: Sedona and Eclipse do not treat American Express the same way. Sedona abbreviates American Express as AMER and Eclipse uses AMEX. When Sedona creates the payment batch it does not place it in the American Express payment batch but puts it in a random batch

Solution: Ensure that any payment batches created with cards of type AMEX to are added to AMER batches to agree with SedonaOffice

ACH Invoice Reflecting Full Amount After Partial Payment Applied (14175)

Product: SedonaOffice

Issue: If a user partially pays an invoice, the EFT transaction for the correct amount, but the AR records pick up the full amount of the invoice. If the transaction then becomes previously funded/refunded, the negative transaction gets processed through Forte at the full amount of the invoice instead of the payment amount

Solution: Resolved the AR records to pick up the amount due on the invoice, not the full amount of the invoice

Cannot Enter Negative Expense Line on PO (14264)

Product: SedonaOffice

Issue: When entering a negative quantity in an expense line on a PO, system errors out with a 'Run-time error 11 Division by 0' error message

Solution: Allowing the quantity to be negative on purchase orders so that the rate can be divided by the quantity

EFTConnectionString Issue (14516)

Product: SedonaOffice

Issue: SedonaOffice requires a default instances of sql server. Migrating customers over to AWS means that we need to use an Alias for a named sql server instance to connect to SedonaOffice. This is working for connecting to SedonaOffice, but for some reason the EFT Process cannot make a connection to SQL server

Solution: Allow overriding the server name with the server instance name

SedonaEmail Named Instances Issue (14640)

Product: SedonaOffice

Issue: When trying to run SedonaEmail on a system referencing a named instance database, the program errors

Solution: Added support for named instances of database servers to SedonaEmail and SedonaComdata

ComData PCI Compliance (15016)

Product: SedonaOffice

Issue: The ComData AP Integration stores PCI compliant information in the SO database

Solution: Ensure that any log or function utilized with this integration does not store PCI compliant information anywhere within the SO database

Manitou Integration Site Address Update (15075)

Product: SedonaOffice

Issues: When updating site address in SO for an account that is attached to Manitou, after saving the address update, users are met with an error and the address on the account in Manitou is not updated

Solution: Ensure that SO users are not met with an error when updating site address for account connected to Manitou, as well as ensure that the Manitou account is updated

Cannot Utilize FSU Appointments (14993)

Product: SedonaOffice

Issues: Some FSU value types in the database were incorrectly set, causing an error that restricted the use of FSU appointments

Solution: Changed the value types in the database to their correct value type

Fix Named Instance Server Connection Issues (14971)

Product: SedonaOffice

Issues: Many .Net applications fail to connect to a named instance database server

Solution: Moved the named instance server resolution into Combase.dll. Modified SedonaEmail and SedonaComdata to use the Combase version of the server resolution. Added support for named instance servers when creating connection strings for reports. Modified the AP Aging Summary and AR Branch Aging reports, to match all other reports that use the ReportParam.txt file.

Bank Payments Created From Service Module Error (14616)

Product: SedonaOffice

Issues: Bank transactions created by the service module are not picking up correct payment information resulting in errors and orphaned transactions

Solution: Ensuring the bank achDirectToken property is not cleared when paying an invoice with a bank transaction

Job Material List Part Price Issue (13787)

Product: SedonaOffice

Issues: When issuing parts to a job that are not already on the materials list, the parts are being added to the material list with a \$0.00

price

Solution: We need to make sure the parts posted to the materials list are posted with the sales price setup for them in part setup

Deposit Checks Not Getting Created (13227)

Product: SedonaOffice

Issues: Credit card payments were processing and showing in the EFT history, but were not creating payments, leaving the invoice still open

Solution: Ensure that the payment is properly created for credit card payments

Fix SedonaSearch Form (13165)

Product: SedonaOffice

Issues: The Search form was displaying incorrectly

Solution: Resolve the display for the search form

Installer Issues (15137, 15153, 15234)

Product: SedonaOffice

Issues: Issues included a named instance update issue and a server version update issue

Solution: Each issue was resolved

Fix SedonaOfficeConnectionManager dll (15288)

Product: SedonaOffice

Issues: The SedonaOfficeConnectionManager dll is using theConnectionString column value to build the connection strings for the company databases

Solution: The connection string needs to be constructed from the values in the ComputerName and DataSource columns instead