

# SedonaOffice - 6.2.0.1 - 9/22/2021

01/05/2024 4:46 pm EST

## Special Upgrade / Install Instructions

If upgrading from a SedonaOffice version prior to 6.0, 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](mailto: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

### Version Support

**\*\*SedonaCloud Users\*\*** - If your company utilizes SedonaCloud in any manner (utilize Sales Automation, Time & Attendance, eForms, SedonaWeb 2.0, or the SedonaCloud API for integrations such as the Manitou integration), you will need to update your SedonaCloud to version 1.30.0.1 or higher when you update SedonaOffice to 6.1.0.62

### Minimum System Requirements:

- Server is on Microsoft .Net 4.6.1

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## Features

### New Upgrade Procedure from 5.7 to 6.1

The new upgrade procedure requires the following steps.

1. Upgrade SedonaOffice to version 6.1.
2. Run PCIComplianceUpdate to tokenize the credit cards. (This needs to be done with the legacy Forte credentials.)
3. Request RestAPI credentials from Forte and enter them into EFT Setup.

4. Run PCIComplianceUpdate again to tokenize the banks.

Please see [technical documentation](#) for further details.

### **New Integration between SedonaOffice and Stages**

We have added the ability to create and link Customer, Site, and Systems from SedonaOffice into Stages. This can be done from several places:

- New Customer wizard
- Existing Customer site
- Existing Customer System

We also can create and push the contacts and configurations (zones) on the Stages side.

In addition, we have the ability to read data back the above data as well as account history. We also include the ability to put just individual systems on-test or the entire account.

Please see Technical Documentation (TBD) for further details.

## **Enhancements**

### **Updated Forte Settlement Process**

The Forte settlement process has been modified to use Forte funding data to process settlements. The purpose of these modifications is to facilitate reconciling SedonaOffice EFT deposit batches with Forte funding entries.

Currently the EFT deposit batches do not match the Forte funding entries, because the EFT deposit batches are created when transactions are approved, whereas the Forte funding entries are based upon when the transactions are funded. Since they will not contain the same transactions, it is difficult for SedonaOffice users to reconcile them.

This new process creates EFT deposit batches that contain the same transactions as the Forte funding entries.

Please see [technical documentation](#) for further details.

### **Manitou Integration Enhancement**

We have updated the integration with Manitou to support creating and pushing Areas as well as Zones from SedonaOffice into Manitou on new account creation. It provides a tab to define Areas, and then on Zones, you can assign all the zones to an Area or to \*. These will push over into Manitou.

# Bugs

## **Job Query builder produces incorrect results due to N/A in the Project Manager field.(17493)[4782]**

**Issue:** Receiving incorrect results when building job queries. Change order shows the Project Manager as N/A N/A even though the job has an assigned project manager.

**Solution:** Updated Change order process to update the project manager and to allow changing the project manager in the. Also changed the stored procedure, Customer\_Jobs\_GET.sql, to get the project manager field when selecting change order.

## **Cannot print the zone list from CS zone list(17494)[3663,14962]**

**Issue:** The System Zone list is blank when printed from the C/S Info button Zone list.

**Solution:** Changed the .RIF File so we can run the ZoneList.exe

## **It is possible to zero out job returns for serialized parts (17512)[9656]**

**Issue:** A serialized part is issued to a job, do a return to stock on that issue. Go back to the return and change the qty on it to 0. The part then shows it has been issued to the job in the job and in the inventory journal, but the serial number listing for the warehouse incorrectly shows the part is in stock.

**Solution:** Prevent user from changing the quantity to zero on job returns for serialized parts.

## **YTD Income Statement GL Wildcard returns all data(17528)[Internal]**

**Issue:** If GL Wildcard is selected for the Year to Date Income Statement and one GL income account is defined in the report parameters, the report includes the detail of all income general ledger accounts not just the GL account selected.

**Solution:** Added a filter for GL Wildcard.

## **Payment address incorrect if vendor added from SedonaSetup(17667)[Internal]**

**Issue:** Payment address is incorrect if vendor added through SedonaSetup when existing vendor is viewed prior to adding the new vendor.

**Solution:** When creating a new vendor, set the payment address to the vendor address.

## **Negative payment batch cannot reverse 2 invoices on 1 check(17740)[9768]**

**Issue:** Cannot apply 1 negative check to multiple invoices. It tries to reverse the entire check amount from the first invoice when you move off the first line.

**Solution:** Removed condition for changing the amount in the grid.

**Part Edit for Serialized part automatically reduces quantity and value to 0(17768)[12232]**

**Issue:** The first time you click save on the part edit of a serialized part, the system makes an automatic adjustments to reduce the quantity and value of the serialized part to 0.

**Solution:** Removed serial number check to get the standard cost from inventory so that it does not reduce the value while updating the serial number.

**Able to issue 1 serial number to a service ticket for a quantity greater than 1(17769)[12231]**

**Issue:** It is possible to issue 1 serial number to a service ticket at a quantity that is greater than 1, which throws off inventory quantity, inventory value and the ticket quantity and value.

**Solution:** Disabled the Quantity Field for serialized parts to restrict the quantity to 1.

**Issue when receiving and adding a serial number to a transfer in mid-transfer(17770)[12230]**

**Issue:** When you are in the middle of transferring inventory and you receive and add a serial number to the transfer the receiving warehouse quantity is increased, but the serial number remains unissued in the original warehouse.

**Solution:** Resolved syncing issues from obtaining data from incorrect subitems.

**Inventory issues/returns indicates you cannot return parts from service tickets, but you can(17888)[12294]**

**Issue:** You can return parts from tickets in inventory issues/returns even though you receive the message "Parts already issued to service must be removed directly from the service ticket!"

**Solution:** Disabled the Save button when clicking on return when parts are already issued to a service ticket.

**Returning a serialized part through inventory issues/returns does not prevent returning it through job part issues.(18086)[12226]**

**Issue:** The part issues screen on a job allows you to return a serialized part even though it was already returned through the inventory issues/returns process.

**Solution:** Check whether a serialized part quantity has already been returned then display a message before saving indicating the serialized part was already returned. Restricted the user from returning the part more than once.

**Blank list returned when printing the Job Types from Sedona Setup. (18828)[15418]**

**Issue:** When printing the Job Types from Sedona Setup I receive a blank list.

**Solution:** Created new report to print Job Types from Sedona Setup.

**The Job Query is still available when removed in User Group permissions. (18964)[12369]**

**Issue:** Removing all query permissions and all report access for a user group still allows users in the group access to the Job Query.

**Solution:** Implemented code to check permission for Job Query menu. Enabled menu only if permission allowed to user group.

**The Jobs over/under report is incorrect when exported. (18968)[12556]**

**Issue:** The jobs over/under report is incorrect because it does not include the estimated sub contract labor when exported. The PDF version appears correctly.

**Solution:** Added custom fields in the query for the CSV export similar to the PDF.

**Error received upon trying to search last for of credit card (18977)[10994]**

**Issue:** Receiving Incorrect Syntax error "ACH\_Last\_Four\_Digits" in Query builder when searching last four of credit card.

**Solution:** Corrected Initialize Tables\_SD Is null function with correct syntax. Also added script in version\_next.sql

**Payment Processing is confusing on the EFT Processing screen(19277)[18161]**

**Issue:** When you open the EFT Processing menu the screen shows the title as Payment Processing, which is confusing since there is a payment processing menu that opens a payment processing screen.

**Solution:** Changed the caption to EFT Processing instead of Payment Processing.

**Net Terms are not calculating correctly. (19283)[16154]**

**Issue:** The terms due by functionality is not showing correctly on emailed invoice.

**Solution:** Corrected the due date while emailing invoice by using CalculateDueDate function. So that It show same due date while printing and emailing invoice.

**Terms Setup sets the Days Due to 0. (19465)[10753]**

**Issue:** When editing a Term in Setup the days net due are reset to 0.

**Solution:** Sync the days net due while updating the record.

**SedonaOffice Database Setup - SedonaDocuments script error (19521)[Internal]**

**Issue:** During the SedonaOffice Database Setup process, the SedonaDocs script throws an error when the SedonaDocuments and

SedonaMaster databases are not in the same SQL Server instance.

**Solution:** Added logic to check if SedonaMaster exists before trying to populate the SS\_General\_Folder table in the SedonaDocuments database with data from the Company table in SedonaMaster. If the SedonaMaster database is not found, then a Warning message is raised to indicate what needs to be done. "Warning: SedonaMaster database is not found on this instance of SQL Server and the SedonaDocuments database cannot be automatically populated with data from SedonaMaster. The SedonaDocuments.dbo.SS\_General\_Folder table will need to be populated manually."

#### **WS\_Account\_ADD2 is not created in SedonaOffice database (19775)[Internal]**

**Issue:** The stored procedure WS\_Account\_ADD2 is not created in Sedona Office databases. This procedure is not in the MasterSetupStandard database and while the file is physically present in the SedonaOffice Database project folder it is not included/reference.

**Solution:**Included Missing store procedure WS\_Account\_ADD2.

#### **Type mismatch 13 on Delete of Postal Code under United Kingdom. (20110)[21461]**

**Issue:** Run-time error '13': Type mismatch message received when trying to delete an existing United Kingdom Postal Code.

**Solution:** Segregated Table3 Id from Tokened string using Parser class. Also made sure users cannot delete postal codes that are in use.

#### **Job Queue can no longer print list of all jobs - have to print each page (20326) [22820]**

**Issue:** Latest update shows multiple pages for Job Queue and I have to print a job list per page. Can no longer print the entire job list at once.

**Solution:** Created a new list view with all records before printing the list.

#### **Error 3265 - Item cannot be found in the collection corresponding to the requested name or ordinal (20417)[22285]**

**Issue:** When creating a bill from a receipt, SedonaOffice throws error 3265 - Item cannot be found in the collection corresponding to the requested name or ordinal.

**Solution:** After closing the receipt, the page that is displayed in the Vendor tree is switched from Purchase Orders to Receipts. The column sort function thought the POs were still being displayed, so it was selecting the wrong column. Fixed this by setting the view selection to the appropriate value.

#### **Fatal error: Router error attempting to generate invoices using Manitou integration. (20553)[22918]**

**Issue:** Receive the following error when trying to generate invoices using Manitou integration , Fatal error: Router error (The Sedona integration library encountered a COM Error: IDispatch error #3079 (Error converting data type varchar to datetime).

**Solution:** Added missing parameters to Invoice\_Add stored procedure call in Auto\_Invoice\_Buffer. Added some additional columns to AR\_Customer and AR\_Customer\_Bill inserts.

#### Manitou integration is locked to US country code. (20804)[00024327]

**Issue:** The United States Country code is hard coded in the Manitou API which is causing issues when countries outside of the U.S. want to push a customer from Sedona into Manitou via the "Manitou Info" button.

**Solution:** Updated the API call so that it will retrieve the country assigned to the Integration User and use that country code when looking for matching dealers in the drop down within the "Manitou Info" button which is used to push a customer from Sedona into Manitou.

#### SO change customer number not propagating to CS. (21543)[[]]

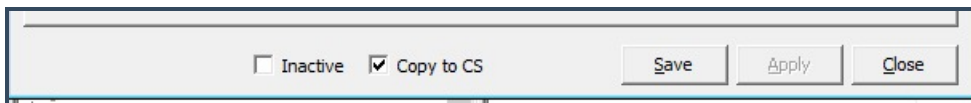
**Issue:** When changing the CustomerID in Sedona, it was updating the A/R number in Manitou which would cause the customer to lose its linking.

**Solution:** Corrected behavior so that the A/R will update as expected and linking is maintained.

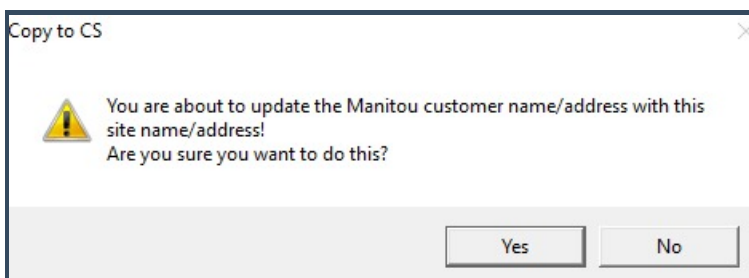
#### Added a 'Copy to CS' option box when editing the Customer Site. (21542)[[]]

**Issue:** Added the ability to let the user select individually if the customer address changes should be updated in Manitou regardless of the option set in the database.

**Solution:** On the SS\_Integration table, if the option for 'Copy\_To\_Manitou' is set to 'N' (false) when editing a site there will be a checkbox at the bottom giving the user the option to force-push address changes to Manitou.



Prior to the changes being saved the user will get a warning message to verify



If the option in SS\_Integration for 'Copy\_To\_Manitou' is set to 'Y' (true) the same functionality will exist including the warning, however the 'Copy to CS' checkbox will be checked by default.

