SedonaOffice - 6.2.0.6 - 6/8/2022

01/05/2024 4:54 pm EST

Special Upgrade / Installation 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

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 1.40.1.2 or higher when you update SedonaOffice to 6.2.0.6

Minimum System Requirements

- Server is on Microsoft .Net 4.6.1

Enhancements/Features

Custom Field Columns to Batch Billing Grid (26326) [Internal]

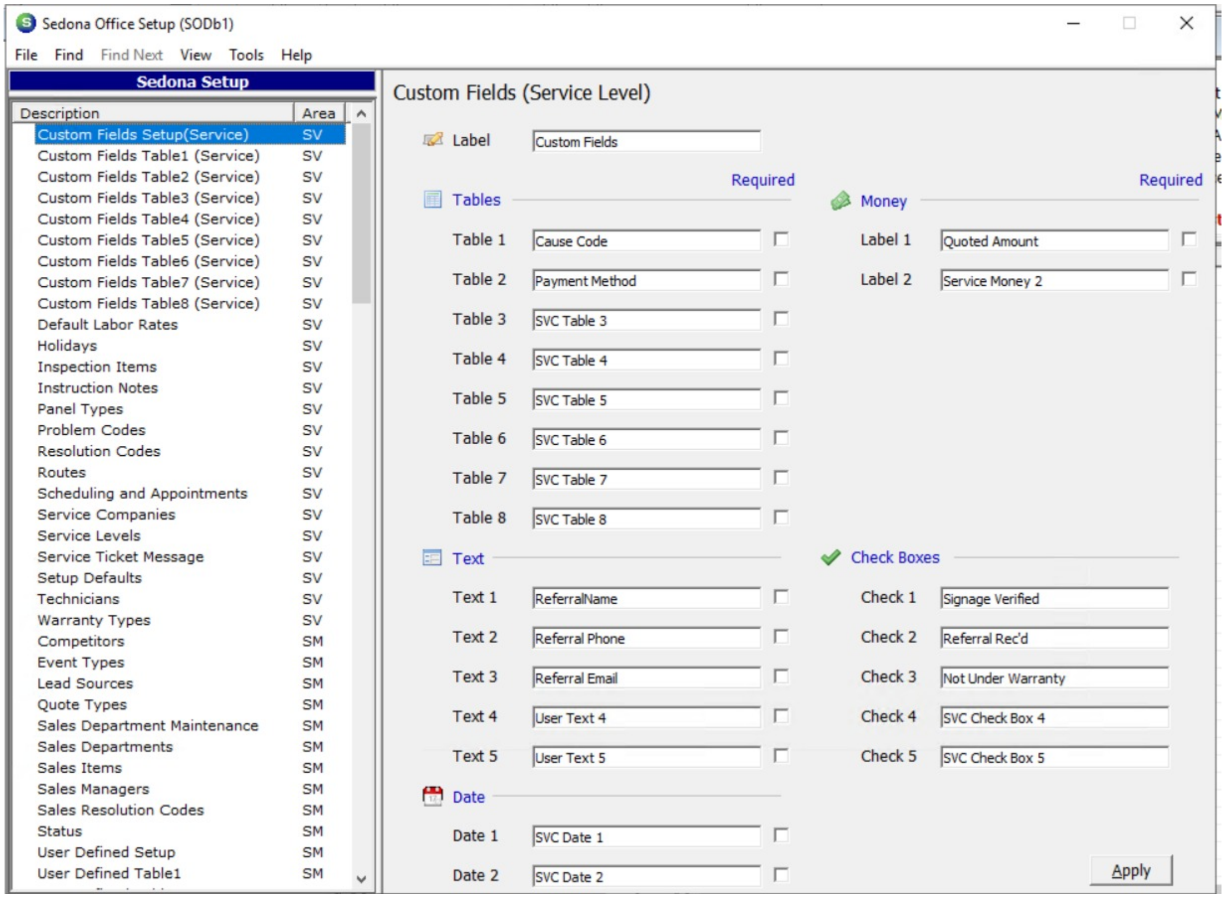
On the batch billing grid in the service console, the custom fields are available columns that can be added to the grid.

Users will see these changes:

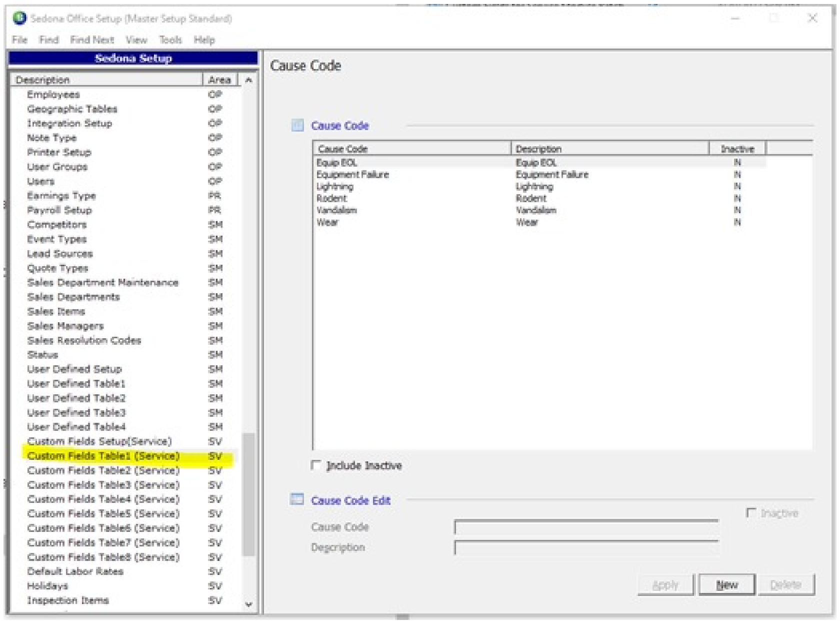
2. The columns can be hidden when using the grid's column selection tool.
3. The columns can be re-ordered.

Custom fields Setup:

1. Go to SedonaSetup.
2. Scroll down the Area column to the Area "SV" to see the Custom Fields Table1 (Service) through Custom Fields Table8 (Service).

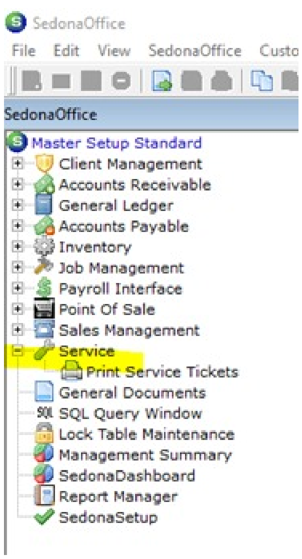


3. There are additional setup screens for the tables (Table1- Table 8).



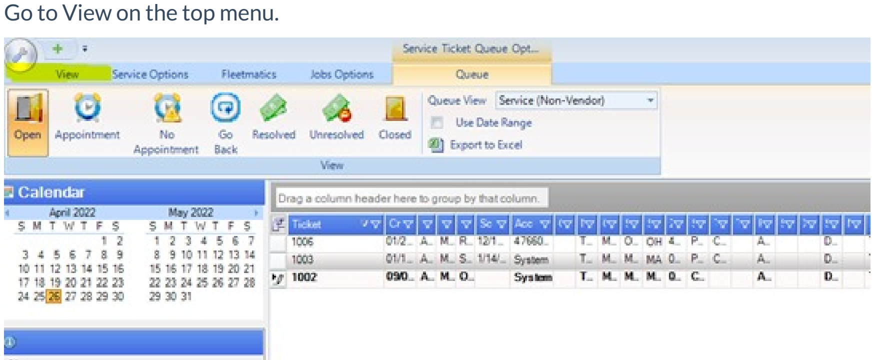
4. These custom fields can be added to the Service Module Batch Billing grid.

5. To add these custom fields, go to SedonaOffice > Service.

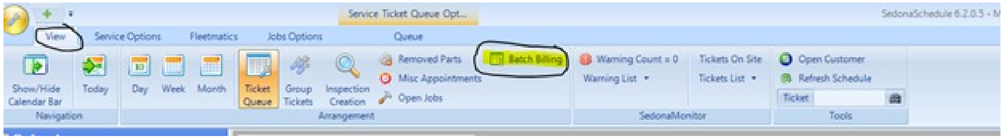


6. Double Click on Service to open the Service Module.

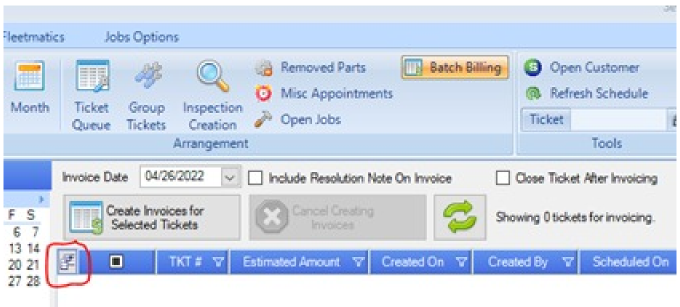
7. Go to View on the top menu.



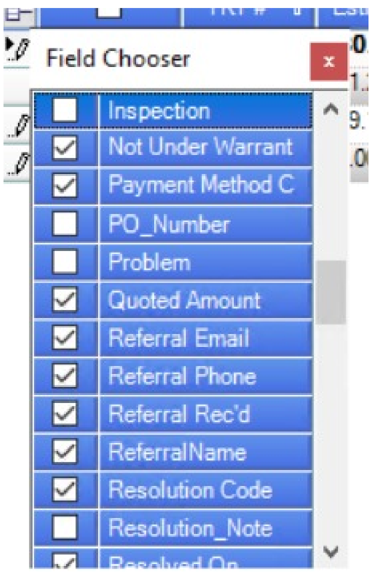
8. Select Batch Billing.



9. Go to the Column Selection icon to the left of the columns on the Batch Billing screen and click the icon.



10. The column selection screen appears.



11. The Custom fields are available for selection in the menu. The custom fields display in the grid only when selected.

Link to detailed description (see 6.2.0.5 for example)

Corrected Bugs (Application Corrections)

Accounts Payable

Discount shows as open balance when paid by credit card prior to payment due date (17633) [Internal]

Issue: If a bill is created for a vendor and paid on the same date using a credit card, then the discount amount shows as an open balance.

Solution: This has been updated to support credit card payment on invoices properly taking discounts, and properly updating net due and GL.

Job Purchase Orders; Memo field clearing out default information. (22495) [00003975]

Issue: Job # and phase default into the purchase order memo field, but then get auto removed when you click anywhere in the PO.

Solution: There is now a check for vendor information in the memo field; if so, it will append with the job number and the phase number in the memo text.

Vendor Journal Details are empty for Credit Card Discount (DISCT) (22558) [00004603]

Issue: The system errors if you try to take a discount on a bill you pay by credit card. If you do, the credit shows as applied to the bill, but there is no GL activity recorded for the application of this credit. Also, the bill shows a balance due of 0 in some places and shows the discount.

Solution: This was corrected by pulling in the branch ID of the vendor if the branch ID was missing.

Recurring Bills list: If the frequency is setup as weekly, the frequency column is blank in the list. (22604) [00004432]

Issue: Recurring Bills list: If the frequency is setup as weekly, the frequency column is blank in the list.

Solution: Corrected the report to display the "Weekly" literal for recurring bills with a W as the frequency.

Receipt is not showing correctly how PO was received (22789) [00004404]

Issue: In the Service Ticket PO, when selecting receive and issue immediately, the transaction was posting correctly. There was a display issue when viewing the receipt - it has the receive to warehouse radio button selected instead of the receive and issue immediately radio button.

Solution: The program was changed to check if a service ticket was filled in instead of a job number.

PO can't be received if line is received and then receiver is deleted. (24750) [00026332]

Issue: When editing and deleting PO receipts, the Lines deleted cannot be received again when added back to the receipt. Message is returned "You cannot receive more than what was ordered!" when you attempt to receive. The Purchase order shows quantity received is 0.

Solution: Resolved by correcting the quantity received, which had been reset to 0 when adding the line to the receiver again.

Close - No Bill Expected is allowed without a Write Off Non Bill Receipt Account. (25097) [38116]

Issue: System is allowing users to mark receipts as close no bill expected even when there is no entry in the write off non-bill receipt setup field. The system used to prevent this.

Solution: Added error check that blocks saving when the user selected the Close No Bill Expected checkbox, on a receipt when the write off account has not been entered.

When restricting warehouses, some screens default to a warehouse that isn't in the list (25803) [Internal]

Issue: When using the setting "Use Material Handler for Warehouse Security" and correctly setting up an employee to be a material handler, some of the warehouse dropdowns will default to a warehouse that shouldn't be brought back.

Solution: When creating a New Purchase order, the default warehouse dropdown list value has been set to display the proper warehouse.

Other ship to address type does not display all fields (26258) [00004668]

Issue: When changing a ship to address on a purchase order to the Country of Other, the Company field does not appear: there were two issues: one, the company field did not show; and 2, when entering information in all three lines and saving, only lines one and two would show.

Solution: The first issue was corrected by changing a programing variable when changing the focus out of the country dropdown. The second issue was corrected by changing the programming value in a blank third line from empty to zero.

Job Cost type does not default when adding bill through vendor (26496) [00004207]

Issue: Job cost type is not defaulting in the vendor bill when adding a bill through the vendor, but it does default if you add the bill through Accounts Payable. Adding a bill should work the same in both places.

Solution: When creating a bill from Accounts Payable > Vendor > Bills, the Default JobType code now shows, making it default the same way it does when creating a bill through Accounts Payable > Bills.

Credit Card Expiration Dates changing to incorrect year (28587) [00047363, 49236]

Issue: Credit card expiration years are changing to 2020.

Solution: This has been corrected by updating the program (the stored procedure) to accept a 4 digit year.

Accounts Receivable

Print Invoice process loops (17520) [Internal]

Issue: When Administrator user is trying to print cycle invoices the system appears to be looping.

Solution: After opening the 'Preparing the Bridgestone Standard' or 'Preparing the Standard Form' window, there is now logic to hide the open window.

Emailed invoices have missing site name on second line item (23843) [00003395]

Issue: When emailing invoices (using basic "Invoice Template") that have more than one RMR line, sometimes following RMR lines are missing the site name.

Solution: The Basic Template has been changed to display the same as the Advanced Template. Instead of the Basic Template showing the name and address for each item on each line, the first line will show the site name and address once and then list all items for that site underneath it. If there is a second site, the line will list the second site name and address once and then list any line items for the second site underneath it.

Site Address not correct on printed Invoice (23853) [00024441]

Issue: When creating an invoice and then changing the site address on the invoice, the invoice in SedonaOffice reflects the new site address but when printing the invoice it still shows the old Site address.

Solution: The program has been changed to properly use the changed site address when printing an invoice.

Run-time error 5 when deleting invoice line item on sub account (24766) [00004516]

Issue: Deleting an invoice item from an unsaved billable-to-master invoice will cause a Run-time error that crashes Sedona Office. (There is no error if deleting an item from an invoice billed to the subaccount.)

Solution: This is corrected so the system now pulls the list of items from an unsaved billable-to-master invoice allowing a user to delete an invoice item.

Clicking Customer Search multiple times after saving invoice does not launch the search. (25067) [Internal]

Issue: After saving an invoice and remaining on the screen if you click search again the invoice header is updated and the invoice is incremented instead of launching the search.

Solution: The search window will now open and a second search can be performed.

Cannot process Credit Cards - caused by fix for 28587 (29057) [00051429]

Issue: Customers cannot process credit cards; receiving errors transaction failed due to an unknown error and could not find stored procedure.

Solution: Corrected SEFT_ACH_ADD to not use trim command which is not supported prior to sql 2017, replaced with ltrim(rtrim which is supported on older versions.

Client Management

Customer search does not hold filter criteria (22077) [00024439]

Issue: Customer search doesn't save your search settings as it is supposed to.

Solution: When customer explorer is called from a modal, there was a default parameter being passed in as 0 (this defaults the search to start with "Begins With"). The default needed to be set to -1 (None) so the search retains the last setting; "Begins with", "Contains", or "Exact".

Split recurring lines are missing desc, reference & memo (22555) [00004420]

Issue: When splitting recurring, the new lines that are created have some blank fields (Description, Reference, and Memo).

Solution: The process was updated to capture the original Description, Reference, and Memo on split items.

Customer Explorer sometimes opens wrong company (22794) [00027201]

Issue: When the customer explorer is opened in one company; the company is closed; and another company is opened, when the customer explorer is opened again, it still retains the old company that has been closed.

Solution: When opening the customer explorer from client management, the customer explorer now shows information from the currently open company.

SedonaOffice Log doesn't record contact deletes correctly (24341) [Internal]

Issue: Deletion of a bill-to contact does not record in the Sedona Event Log correctly.

Solution: Deleting a contact from Bill to or Site contacts will now record the delete in the Sedona Log correctly.

User Defined text fields only allow 40 characters - should be 50 (24767) [00004414]

Issue: The Text fields on the Custom Fields tab of the Customer System Screen are allowing only 40 characters in the text fields when it should be 50 characters.

Solution: The Text fields on the Custom Fields tab of the Customer System Screen have been changed to accept 50 characters.

AR Invoicing: master account search followed by another search (25490) [Internal]

Issue: When searching for a customer from AR Invoicing, select a customer that is a master account or sub account. Then immediately search for another customer that is not a master or sub account. The system treats this second customer as though it is a sub-account of the first selected master account.

Solution: Logic changed to reset master account for a customer if the customer is not a master customer.

Job Management

Inventory Defect in Job Module (22586) [00004270]

Issue: When trying to add parts to a job under Tools > Issue Parts, the system will add the part cost, but the cost is always 0.00. When adding it under the Materials, the system will add the cost of the part.

Solution: The program has been changed so that when adding parts using Tools > Issue Parts, the part cost is added.

Apostrophe in Job Type causes error (22587) [00004280]

Issue: If a job type code has an apostrophe on it, the commissions tab within the job gives an error.

Solution: The Job Type now allows an apostrophe.

In past timesheets, decimals on Units were replaced by whole numbers (22630) [00004689]

Issue: When opening a previously saved Timesheet batch and clicking on the Units column to sort, any fractions of an hour disappear - hours only show whole numbers.

Solution: Fractions in units no longer disappear when sorting by Units column in a previously saved timesheet list.

Decimals replaced by whole numbers on units in newly imported timesheet if sort occurs prior to Save (26752) [Internal]

Issue: If a sort occurs before saving a newly imported timesheet (imported using .csv file), the decimals are replaced with whole numbers. It appears to round to the nearest whole number (whether up or down).

Solution: Fixed the issue while importing data from a csv file in a TimeSheet.

Inventory

Cost column incorrectly populates as 0 in inventory journal (22603) [00004430]

Issue: The cost column incorrectly populates as 0.00 in the inventory journal when you do a stock adjustment to reduce the on hand quantity. The extended cost and journal entry are correct, only the cost column in the inventory journal is wrong.

Solution: The cost entry has been corrected to properly show the cost when a stock adjustment reducing the quantity on hand has been made.

Cannot edit a vendor from the parts menu (22652) [00004478]

Issue: Once opening a vendor through the parts screen and closing the vendor, users cannot open that same vendor again on the parts screen.

Solution: The lock on the vendor table gets deleted when users click the vendor again.

Query Builder

AP Query Builder Error -2147217900 The multi-part identifier "apcp.Credit_Id" count not be bound. (22602) [00004413]

Issue: When using credit parts fields , the AP query builder was generating -2147217900 sql error.

Solution: Aliases in SD_Query_Builder_Def have been fixed to prevent errors.

Customer Query builder missing some columns in customer_bill table (23858) [00025909]

Issue: The Customer Query builder was missing some columns in the customer_Bill table, which was introduced in the newer version of sedonaoffice, such as Email_Cycle_Invoice, Email_Job_Invoice, and Email_Other_Invoice Email_Service_Invoice; and the customer_bill_Email table is not captured at all.

Solution: Added missing fields to Bill To and added Bill To Email to Customer Query Builder.

Report Manager

When printing out payments received we sometimes have a different branch name under totals? (19476) [00015298]

Issue: When printing the AR/Payments Received report, if a branch contains only a single payment, the branch on the Total line was different from the branch in the header.

Solution: The report now displays the correct branch on the Total line, even if the branch only contains a single payment.

Service ticket list report does not show resolved tickets (22434) [00004635]

Issue: Service ticket list report does not show resolved tickets.

Solution: When selecting "Show All Open", all tickets with any status display other than the status closed.

Accounting Ratios report in General Ledger, the date and data are as of the 1st of the month instead of the end (22930) [00004212]

Issue: The Accounting Ratios Report prompts an accounting period range. Which indicates it is going to give the totals for that whole accounting period range, but when the report generates, it gives the totals as of the first day of the chosen range only.

Solution: The report now shows end date of the selected date range 'As of'.

Long State names cutoff on Technician Schedule Report (24786) [00004559]

Issue: The "Technician Schedule" report uses the full name of a state, which cuts off the zip code on the report.

Solution: The Technician Schedule Report was changed to use a field that has a two character abbreviation for the state.

Technician Performance Report Grouping Broken (26335) [00040459]

Issue: The Technician Performance (Time) report does not group correctly. If grouping the report by Branch with a secondary grouping of technician, the report still only groups by technician. If grouping by Branch with a second group by of none, the report still only groups the report by technician.

Solution: The report has been changed to implement grouping by branch in both first and second grouping.

Customer Cancellation Report Label Defect (26470) [00036626]

Issue: When the customer cancellation report is generated the option for show branch labels can be selected. If this is selected the report still only shows one branch label. The customers cancelled in each branch show up, but they show up all under the one branch label.

Solution: The cancellation report has been changed to show the customers under their branch labels.

YTD Income statement monthly totals incorrect (26947) [00019795]

Issue: YTD income statement incorrectly gives monthly totals. If an account is 0.00 by the end of the month, the statement is not showing the activity for that month.

Solution: The statement was changed to show activity for an account even if the account balance is 0.00 at the end of the month.

Service

Error in SedonaSetup (22497) [00004359]

Issue: User Group Security Settings do not appear to carry through to the Service Module Schedule Board. Jobs that should be restricted and should not appear, do appear in the Open Job list.

Solution: The user group security settings now work correctly on the Service Module Schedule Board, so users see only the appropriate jobs.

Setup

Add message when Postal Codes cannot be deleted (21770) [Internal]

Issue: If a postal code cannot be deleted, the system gives the user a message why

Solution: When a postal code cannot be deleted because it is in use, there is a new message "Postal Code in use. Cannot be deleted."

Postal/Zip Code not visible if service company and route are not defined. (21780) [Internal]

Issue: Postal/Zip codes do not appear in the geographic table list if a service company or route is not defined.

Solution: Default the service company Id and route Id to 1, if none is selected when creating a new postal/zip code.

Fixed the postal/zip code query, in SedonaOffice and SedonaTables, so that it will retrieve codes with 0 service company Id or route Id.

Setup-Custom Fields Service Tables grids show inactive entries even when "Include Inactive" is not selected (21971) [Internal]

Issue: The Custom Service Table grids show inactive entries if the Include Inactive check box is cleared

Solution: The Setup Table was changed to correct this so that inactive entries are shown only when the Include Inactive check box is selected.

Able to delete SedonaDocuments table SY_Document_Type Bug ID (22489) [00027247]

Issue: Deleting SY_Document_Type records from the front-end under SedonaSetup>Document Types causes orphaned document records across several other SedonaDocuments data tables.

Solution: The program was changed to allow users to delete a document type only if there are no documents actively using that type.