

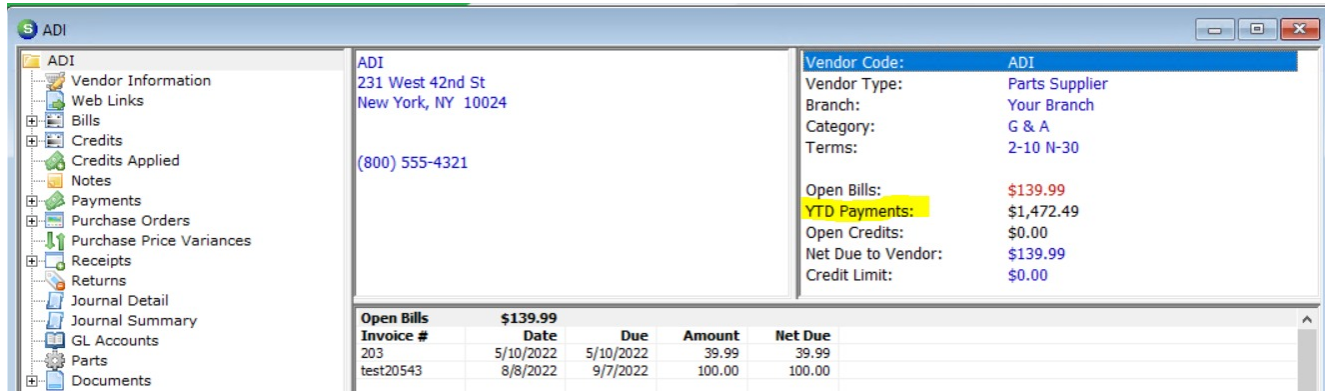
SedonaOffice - 6.2.0.8 - 9/14/2022

01/05/2024 5:17 pm EST

Enhancements/Features

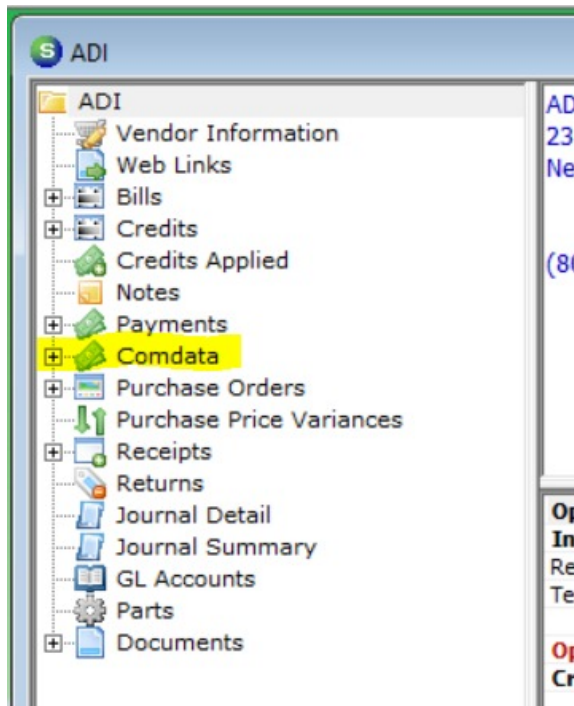
23855 Added a YTD (Year to Date) Payment Amount Field to Vendors

On the Vendor information screen, there is a new field showing the year to date payments based on current fiscal year made to a vendor.



23856 Electronic Payment Vendor Tree Node (Comdata)

For dealers using Comdata for electronic payments, these payments are visible:



Users can see details for Comdata payments:

The screenshot shows the ADI software interface. On the left is a navigation tree with '2022 Comdata' selected. The main area is split into two panes. The top pane displays vendor information for ADI, including address and contact details. The bottom pane shows a table of payments.

Payment Date	Bank Account	Amount
8/24/2022	100200	39.99
8/24/2022	100200	100.00
8/18/2022	100200	25.00
Totals		164.99

Users can also see Comdata payments included with all other payments:

This screenshot shows the ADI software interface with '2022 Payments' selected in the navigation tree. The vendor information pane is the same as in the previous screenshot. The payment table below includes both Comdata and other payments.

Check Date	Check #	Bank Account	Amount	Memo
8/24/2022	224N72D9D4	100200	39.99	
8/24/2022	224N72D9C2	100200	100.00	
8/19/2022	2006	100200	500.00	Testing Memo from Write Checks
8/18/2022	2004	100200	1,242.49	
8/18/2022	224N66E2K9	100200	25.00	
8/18/2022	2005	100200	205.00	
8/17/2022		100200	0.00	
Totals			2,112.48	

29197 Collection Queue Indicates when Results have been Filtered

When users filter the Collection Queue, there is a new message at the top of the Collection Queue screen to the right of the Include Late Fees in Amount Due check box that says "Results filtered by branches selected in Collection Profile Setup".

Collection Queue: Over 30 - Auto Sequence # 40

10036
Ray Brown
777 West Rd
777 West Rd
Columbus, 43202
(877) 999-8765

Amount Due: \$266.95
Credits: \$0.00

Last Late Fee: \$0.00

Results filtered by branches selected in Collection Profile Setup.

Customer #	Name	Phone	Last Activity	Follow Up	Status	Amount Due	Credits	Current	1-30 days	31-60 da...	61-90 d
10036	Ray Brown	(877) 999-8765	Auto Put in Queue	6/23/2022	2nd Coll LTR	266.95	0.00	117.70	58.85	90.40	0
10025	Sam Smith	(888) 234-5678	Auto Put in Queue	6/23/2022	O/S Coll	26.75	0.00	0.00	0.00	26.75	0
10012	Tom Thompson	(614) 253-6767	Auto Put in Queue		1st Coll Call	149.09	0.00	0.00	0.00	149.09	0
10034	Dave Davidson	(855) 777-3456	Auto Put in Queue		1st Coll Call	16.05	0.00	0.00	0.00	16.05	0
10105	Testing Bug 21531	(704) 880-2377	Auto Put in Queue		1st Coll Call	529.65	0.00	0.00	0.00	529.65	0
10107	TG Test 23843	(704) 880-2377	Posted Payment		1st Coll Call	2,985.25	0.00	986.54	1,973.75	24.96	0
10119	Test 24127		Auto Put in Queue		1st Coll Call	192.60	0.00	0.00	0.00	192.60	0
10124	Customer Two test ca...	(704) 880-2377	Auto Put in Queue		1st Coll Call	107.00	26.75	26.75	0.00	80.25	0
10109	Tandra Testing 22742	(704) 880-2377	Auto Put in Queue		1st Coll Call	14,431.22	0.00	0.00	477.00	0.00	13,954
10110	TG Testing 22742 afte...	(704) 880-2377	Auto Put in Queue		1st Coll Call	6,189.30	0.00	0.00	636.00	1,257.25	4,296

Total Due: \$24,893.86
Quantity: 10

Close

29510 INTERNAL Stages Integration Sync Restrictions - dB

On the CS_TP_SETUP table there is a new column called AutoSync. This will not appear in the UI and to be disabled, it must be changed through SQL. It is a small int type. Zero means off. Everything else means on. Its default is 1. This is used to specify whether the Stages (SGS) integration we enable will allow and display the ability to auto sync or not.

29795 INTERNAL Stages Integration Sync Restrictions - UI in Setup

On the SedonaOffice Setup screen under the Integration Setup option, the Update Common Fields checkbox is visible only if the new AutoSync column in the CS_TP_SETUP table is not zero. If the value of the AutoSync column is Zero, the Update Common Fields checkbox is hidden.

Sedona Office Setup (Sedona Security)

File Find Find Next View Tools Help

Sedona Setup

Description	Area
Event Types	SM
Extended User Defined Fields	CM
Geographic Tables	OP
GL Account Defaults	AP
GL Account Defaults	AR
Holidays	SV
Inspection Items	SV
Install Companies	JM
Installers	JM
Instruction Notes	SV
Integration Setup	OP
Inventory Setup	IN
Invoice Descriptions	AR
Invoice Groups	AR
Invoice Items	AR
Item Types	AR
Job Approval Group	JM
Job Expense Types	JM
Job Phases	JM
Job Statuses	JM
Job Tasks	JM
Job Types	JM
Labor Tasks	JM
Late Fee Rules	AR
Lead Sources	SM
Manufacturer	IN
Material Handlers	IN
Note Type	OP
Open Current Accounting Period	GL
Panel Types	SV
Part Labor Unit Desc	IN
Payment Methods	CM
Payroll Setup	PR
Prevailing Wages	JM
Printer Setup	OP
Problem Codes	SV

Integration Setup

Integrators List

Description	User Name	Server Name	Database Name	SQL User	U..	C..	Alt Server Na
CMS					Y	N	
Manitou	BOLD	Manitou	Manitou	SedonaUser	Y	N	Manitou
ManitouNEO					N	N	
Rapid Response	99993Perennial				Y	N	
Stages CS AG					N	N	
Stages CS Rapid					N	N	
Stages CS UCC					Y	N	

Integration Edit

Description: Alternate Server

User Name: Server Name

User Password: Database Name

Primary Server: SQL User

SQL Password:

Update Common Fields

CS Setup Apply

29796 INTERNAL Stages Integration Sync Restrictions - UI in Customer Site

On the Customer Site edit screen, the Copy to CS checkbox is visible only if the new AutoSync column in the CS_TP_SETUP table is not zero. If the value of the AutoSync column is zero, the Copy to CS checkbox is hidden.

29797 INTERNAL Stages Integration Sync Restrictions - Customer Site save changes

The process for saving sites and pushing to Stages has changed. When saving a Site, the saving logic checks for the Copy to CS checkbox and checks the new AutoSync column in the CS_TP_SETUP table. If the new AutoSync column is not zero, saving the site updates Stages (even if the Copy to CS checkbox is selected). If the new AutoSync column is zero, saving the site does not update Stages.

Application Corrections (Corrected Bugs)

Accounts Payable

Development ID	CRM ID	Resolved Issue
20208	00017550	<p>Trial Balances out of Balance</p> <p>Corrected an issue with re-saving an AP bill with changes to an expense line that had a branch different from the bill header branch that would cause branches to be out of balance on the GL.</p>

Development ID	CRM ID	Resolved Issue
21536	00014441	Point of Sale - updated cc that has been declined are not recorded Updated the calculation for the amount due so that if a credit card transaction is declined and reprocessed the amount due is properly updated.
22742	00029712	Cannot take AP Bill off Payment Hold Corrected an issue that was preventing users from taking a bill, linked to a closed job with WIP, off payment hold by enabling the Save button on bills that are tied to closed jobs with WIP. Users can edit these fields on the bill: Hold Payment checkbox, Reference Number, Terms, Payment Date, and Memo.
29533	52264	Cannot open receipt once returned to vendor Resolved an issue with users being unable to open a receipt once it was returned to vendor by saving the receipt ID of the original receipt before creating the return, so that it can be used to open the original receipt.
30546	00056801,57822,57127,54724,58155	Documents Tab in Vendor PO is inaccessible Resolved an issue that was preventing users from seeing the list of documents that they have uploaded to a purchase order.

Accounts Receivable

Development ID	CRM ID	Resolved Issue
27084	00040662,38248,38590,38660,39166,39573,40021,40123,40159,40681,40727,41134,41290,41326,41329,42018,42162,43831,43861,48264	View Checks Error - Cannot view details of a deposit Resolved an issue within a payment batch that would cause a runtime error when clicking the View Checks button. This was caused when the transaction status had a null value. Now the program treats the null value as an empty string. NOTE - INTERNAL ONLY (SUPPRORT/IT/PROFESSIONAL SERVICES) - IF THE CHECKS DO NOT APPEAR IN THE LIST AFTER THIS UPDATE IS APPLIED, THERE IS A SCRIPT ATTACHED TO ADD A SPECIFIC RECORD TO THE AR_ACH TABLE THAT WILL SOLVE THAT PROBLEM.
27602	00045608,46436,45960	Miscellaneous Invoices created as cycle bills Resolved an issue creating an invoice from the invoicing module under accounts receivable where the type was automatically changing to "Cycle Bill" when the invoice was created. Now when creating an invoice through Accounts Receivable > Invoicing and selecting an invoice type, the invoice type remains as selected when the invoice is saved.
29557	00024441	Site Address not correct on printed Invoice Resolved an issue with a printed invoice showing the old address when users created the invoice and changed the site address on the invoice.
29756	00052163	Advance Deposit Applied twice to invoice Resolved an issue when there is more than one advance deposit being applied to an invoice when it should not.

Client Management

Development ID	CRM ID	Resolved Issue
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Development ID	CRM ID	Resolved Issue
24478	00029644	<p>Sedona Collection Queue Issue - customers remain in collection queue when their branch is removed</p> <p>Changed the checks for the collection queue to make sure the customer's branch matches a branch used by the collection.</p>

Job Management

Development ID	CRM ID	Resolved Issue
22521	00004160	<p>Locked column is blank on Job Tasks applied from a template</p> <p>Resolved an issue with the Tasks grid not displaying the Locked column.</p>
26733	00041521	<p>Custom Job Label missing after update</p> <p>Recreated the Custom Job Level Report and added it so that it will launch from the menu.</p>
27446	INTERNAL	<p>Stock setting does not carry over to Materials when adding a part via Tools > Issues/Parts</p> <p>Added the Stock setting when adding a part using Tools > Issue parts.</p>
27819	00047090, 52116	<p>Error when looking up job statuses in job list and using the enter key</p> <p>Fixed an error (Run-time error '91': Object variable or with block variable not set.) that occurred when pressing the enter key while in a filter list.</p>
29349	00052436, 53938, 54616, 56843, 58568	<p>Service Module - Open Jobs not displaying</p> <p>Resolved an issue where the Service Module was not showing the list of open jobs.</p>
29704	00054819, 53300, 56006	<p>Part costs pulling into jobs when job type is marked as Zero Part Price</p> <p>Resolved an issue where customers were experiencing the Zero Part Price option being randomly ignored in jobs.</p>

Inventory

Development ID	CRM ID	Resolved Issue
28726	48265, 44819, 49814, 53065, 57409	<p>Type Mismatch error with retrieving data from Specific Warehouse Journal</p> <p>Resolved the error (13 Type mismatch) when navigating to a warehouse and accessing a journal.</p>

Query Builder

Development ID	CRM ID	Resolved Issue
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Report Manager

Development ID	CRM ID	Resolved Issue
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Development ID	CRM ID	Resolved Issue
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Service

Development ID	CRM ID	Resolved Issue
19715	00009710	<p>Error Messages when doing third party billing unable to bill out service</p> <p>Resolved error messages when doing third party billing with these changes: when a customer is selected for Third Party Bill To on a Service Ticket, the default is the Bill To of the customer that is defined with 'Primary Service' checked. The dropdown will display all active Bill To addresses associated with the customer selected. If the user selects another Bill To that is not defined with 'Primary Service', there is a message that will alert the user that the Bill To is not the primary, confirming that they want to use an alternate bill to.</p>
27661	00045368	<p>Billed invoices showing \$0 amount when posted on accounts</p> <p>Resolved this issue by blocking users from creating an invoice when they have unsaved changes.</p>

Setup

Development ID	CRM ID	Resolved Issue
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		-

eForms

Development ID	CRM ID	Resolved Issue
		--
		-

Sales Automation

Development ID	CRM ID	Resolved Issue
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		-

Time & Attendance

Development ID	CRM ID	Resolved Issue
		--
		-

Integrations

Development ID	CRM ID	Resolved Issue
24953	00004605	WeSuite - imported jobs are losing original user on notes Resolved an issue with having the create user of a note overwritten when importing a WeSuite job; now importing a WeSuite job preserves the username that created the note in WeSuite.
26284	00037413	Error when running dealer billing post report in Manitou Resolved an error displayed when running the dealer billing post report by adding the missing 'tax exempt' parameter to the stored procedure Invoice_Item_ADD.
26937	43298, 58721	WeSuite - Material Burden not getting allocated to 'other' cost bucket Resolved an issue with material burden not being added to the other cost bucket on job costing by adding the material burden to the Estimated other section for job cost, which puts this value in the appropriate section.

Stored Procedures

Stored Procedures Updated:

Invoice_Item_ADD

WS_Account_Register (Updated for SedonaWeb 2.0 customer registration issue - Clients cannot create SedonaWeb users. This change requires an update to SedonaAPI version 1.42.0.)

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 1.42.0 or higher when you update SedonaOffice to 6.2.0.8.

Minimum System Requirements

- Server is on Microsoft .Net 4.6.1