

# SedonaOffice - 6.2.0.9 - 12/14/2022

01/05/2024 5:19 pm EST

## Enhancements/Features

### 18973 | 00012850 | Void Payments from EFT Processing

We have added functionality to allow users to void payments from an EFT transaction through EFT history. This was a feature that was previously available in SedonaOffice version 5 and has been implemented in Version 6.2.0.9.

### 30622 | SedonaOffice Customer Registration Code

We added the registration code field with a command button to generate a new registration code to the Customer Setup screen:

The screenshot shows the 'Customer Setup 10290' window. The 'Registration Code' field is highlighted with a red box and contains the value 'E7C6ED'. A circular refresh button is located to the right of the registration code field. The window also displays various other fields such as Customer #, Customer Name, Address, Customer Status, Customer Type, Terms, Tax Exempt #, EIN, OK to Increase, Salesperson, Blanket P.O., P.O. Expire Date, Customer Since, Chain Account, Customer Group, Customer Group 2, Branch, Invoice Group, No Collections, Part Pricing Level, Master Account Information, Invoice Printing, and Critical Message.

The following changes support this change:

1. Database change: Added the Registration\_Code varchar(6) column to AR\_Customer.

2. Added the [registration\_code] index to AR\_Customer.
3. Added stored procedures Generate\_Random\_HexChar and Generate\_Random\_Code.
4. A registration code is generated when a new customer is added.

During the update all customers will automatically get a registration code added. The registration code is visible in edit mode on the Customer Setup screen.

### **30623 Registration Code to be Added to Invoice Templates**

A field for the customer's registration code has been added to the standard forms and the Bridgestone standard form. For the three standard forms, the registration code was added in the upper right under the customer number and date:

# Your Alarm Company

555 Somewhere Dr  
Some Place, USA 5555  
(555) 555-1212

# Invoice

Invoice Number	Date
1044	1/1/2022
Customer Number	Due Date
10264	1/1/2022
Registration Code:	4D3732

  
To: Durango West Installers  
22744 Highway 160  
Durango, CO 81303

Remit To: Your Alarm Company  
1234 Somewhere Dr  
Some Place, MI 55555

Amount Enclosed: \_\_\_\_\_ **Net Due: \$6.29**

*Detach And Return Top Portion With Your Payment*

Customer Name	Customer Number	PO Number	Invoice Date	Due Date
Durango West Installers	10264		1/1/2022	1/1/2022
Quantity	Description		Rate	Amount
1.00	Durango West Installer, 22744 Highway 160, Durango, CO Add Charges (Added on 09/09/2022)		5.90	5.90
	Tax			0.39
	Payments/Credits Applied			0.00
			<b>Subtotal:</b>	<b>\$5.90</b>
			<b>Invoice Balance Due:</b>	<b>\$6.29</b>

\*\*\*\*\*  
Message that will print on Std  
invoices - 50 char.

Date	Invoice #	Description	Amount	Balance Due
1/1/2022	1044	Contracted Services	\$6.29	\$6.29

Invoice created by Manitou

For the Bridgestone standard form, the registration code is centered near the bottom, above the dashed line:

# Your Alarm Company

555 Somewhere Dr  
Some Place, USA 5555  
(555) 555-1212

## Invoice

Customer ..... Durango West Installers  
Customer Number ..... 10264  
Invoice Number ..... 1044  
Invoice Date ..... 1/1/2022  
PO Number .....  
PAYMENTS APPLIED THRU ..... 11/9/2022  
Job / Service Ticket # .....

## CURRENT CHARGES

Quantity	Description	Rate	Amount
<i>Durango West Installer, 22744 Highway 160, Durango, CO</i>			
1.00	Add Charges (Added on 09/09/2022)	5.90	5.90
		<b>Subtotal:</b>	<b>\$5.90</b>
	Tax		0.39
	Payments/Credits Applied		0.00
		<b>Invoice Balance Due:</b>	<b>\$6.29</b>

## IMPORTANT MESSAGES

Message that will print on Std  
invoices - 50 char.

Invoice created by Manitou

Registration Code: **4D3732**

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Please detach and return this portion with your payment to ensure proper credit.



## REMITTANCE INFORMATION

Customer Number ..... 10264  
Invoice Number ..... 1044  
Invoice Date ..... 1/1/2022  
**Due Date** ..... **1/1/2022**  
Invoice Balance Due ..... \$6.29  
**TOTAL DUE** ..... **\$6.29**  
Amount Enclosed: .....

Durango West Installers  
22744 Highway 160

**T TO:** Your Alarm Company  
1234 Somewhere Dr

### 30747 Bank EFT Processing Manual Approval Popup

When users would manually submit a payment from the Ready tab to the Approved tab in EFT processing, there would be a confirmation message (Are you sure that you want to proceed? Yes/No) for each transaction (for example, if there was one transaction there was one confirmation, if there were 10 transactions, there were 10 confirmations). This confirmation message has been removed. This means that there is no confirmation when manually submitting payments to Forte.

# Application Corrections (Corrected Bugs)

## Accounts Payable

Development ID	CRM ID	Resolved Issue
25420	00004301	<b>System Errors - Application/Workstation Errors when all branches and warehouses are checked</b> Resolved an issue with the parameter "@branches" by changing varchar(8000) to varchar(max).
29374	00047132	<b>Missing Vendor Invoice Date</b> Resolved an issue with the default date for a vendor bill. If the billing date field is blank, the system saves the current date as the billing date.
29910	00047498	<b>Vendor PO Received Cost Defect</b> Going to a vendor and looking at received purchase orders that have only expense items (no parts), the received column showed 0. Resolved this by including expense costs in the receipt total cost on the purchase order list screen.

## Accounts Receivable

Development ID	CRM ID	Resolved Issue
27928	00004669	<b>Decrease recurring rate for Site RMR does not decrease</b> Resolved this issue so the Reduce RMR field is updated with the Original RMR amount less the Rate Decrease amount entered in the Rate field.
28409	00044134	<b>Items disappear from Payment Processing window</b> Resolved a display issue that occurred when clicking column headings after automatically applying an amount to open invoices.
29367	00050078, 55092	<b>Customer Activity Ledger does not match balance due</b> Resolved an issue with the customer activity ledger not matching the balance due by fixing the stored procedure Customer_Ledger.
29377	00046540	<b>Print Invoices duplicates each record 7-8 times!</b> Resolved this issue so that when printing invoices duplicates are not printed.
30403	00050393	<b>SedonaEmail Advanced Bridgestone Form Printing Incorrectly</b> Resolved this issue by changing the Invoice Bridgestone Advanced.html template to correct the order for address.
30477	00055506	<b>Changes for Manitou Dealer Billing Post</b> Two changes made for this integration: <ol style="list-style-type: none"><li>1. Created a new SQL User-Defined Table Type Auto_Invoice_Buffer_Lines_SC that is used by the new Auto_Invoice_Buffer_SC.</li><li>2. Created a new Auto_Invoice_Buffer_SC stored procedure that is called by Manitou -&gt; SedonaCloud integration via /api/CustomerInvoice/AutoInvoiceBuffer.</li></ol> This requires updates to SedonaCloud (1.43.0) and Manitou (2.1.36).

Development ID	CRM ID	Resolved Issue
30746	00056427	<b>Allow Edit of Cycle Invoices</b> Resolved this issue by allowing users to edit cycle invoices unless the invoice has been sent to the customer.

## Client Management

Development ID	CRM ID	Resolved Issue
27160	00044125, 50695	<b>Error when editing billing information to add email address</b> Resolved this error by updating the primary email field on customer billing information when adding or updating the primary email in the list.
27767	58457	<b>Search Filter is not retained when navigating from certain fields</b> Resolved an issue with the Search Filter so that it now retains its settings.
29652	INTERNAL	<b>AR_Customer_Site.phone1 datatype shows varchar(12) in dbs; stored proc and API shows varchar(25)</b> Created update script to alter the size of Phone/Fax fields for Customer Billing and Customer Site to match specifications for API.
32012	00065982	<b>Error Attempting to finish cancelling customer in cancellation queue</b> Resolved an issue causing an error when finishing the cancellation for a customer in the cancellation queue.
32013	00065971	<b>Cannot add a customer to cancellation queue</b> Resolved an issue with the cancellation queue so that selecting a customer from the search opens the cancellation form.

## Job Management

Development ID	CRM ID	Resolved Issue
ID	CRM ID	<b>N/A</b> N/A

## Inventory

Development ID	CRM ID	Resolved Issue
20751	00020817	<b>Balance Sheet and Trial Balance do not agree</b> Resolved this issue by allowing users to select only existing accounts in the PPV account field, which prevents transactions from being created that have no GL Account associated with them.

## Query Builder

Development ID	CRM ID	Resolved Issue
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Development ID	CRM ID	Resolved Issue
ID	CRM ID	<b>N/A</b> N/A

## Report Manager

Development ID	CRM ID	Resolved Issue
24289	00035807	<b>Error running AR Aging By Effective Date Extended* report</b> Resolved this issue by including a missing table and stored procedure so that the report can run.
29476	00043686	<b>Report displays zero bal accounts when zero balance accounts option is not checked</b> Resolved an issue with the Income by Category report that was displaying a zero-balance account when users did not select the option for zero balance accounts.

## Service

Development ID	CRM ID	Resolved Issue
		<b>N/A</b> N/A

## Setup

Development ID	CRM ID	Resolved Issue
22551	00004361	<b>Marking access in another module marks Customer Management</b> Resolved an issue where selecting rights in a module was also (incorrectly) selecting the Customer Management module.

## eForms

Development ID	CRM ID	Resolved Issue
ID	CRM ID	<b>N/A</b> N/A

## Sales Automation

Development ID	CRM ID	Resolved Issue
ID	CRM ID	<b>N/A</b> N/A

## Time & Attendance

Development ID	CRM ID	Resolved Issue
ID	CRM ID	N/A N/A

## Integrations

Development ID	CRM ID	Resolved Issue
ID	CRM ID	N/A N/A

## Stored Procedures

### Stored Procedures Updated:

- Customer\_Ledger
- Auto\_Customer
- Customer\_ADD
- Customer\_GET
- Customer\_UPD

### New stored procedures:

- Generate\_Random\_HexChar
- Generate\_Random\_Code
- Auto\_Invoice\_Buffer\_SC

## Database Changes

- Added the Registration\_Code varchar(6) column to AR\_Customer.

## Special Upgrade / Installation Instructions

If upgrading from a SedonaOffice version prior to 6.0, the following related updates are also required:

**Legacy SedonaWeb 1.0** - Be aware that if your company uses Legacy SedonaWeb 1.0 (latest version 2.7.80) with SedonaOffice version 6.2.0.8 and earlier, we recommend that you transition to using SedonaWeb 2.0.

Legacy SedonaWeb 1.0 is not for SedonaOffice 6.2.0.9 or later.

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

If your company uses SedonaAPI in any manner (Sales Automation, Time & Attendance, eForms, or the SedonaAPI for integrations such as the Manitou integration), you need to update SedonaWeb/SedonaAPI to version 1.43.0 (or higher) when you update SedonaOffice to 6.2.0.10.

**Performing Update** - Once you have reviewed all 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