

Development Only - Release Notes - 12/8/2021

01/05/2024 5:27 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

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 6.2.0.4

Minimum System Requirements:

- Server is on Microsoft .Net 4.6.1
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Features

Enhancements

Updates to 1099-NEC form for Tax Year 2021:

- Added a new 1099-NEC ActiveReport specific for Tax Year 2021 (and after). The 2021 specification has 3 forms on a single page

as opposed to the 2020 version which only had 2 forms per page.

- Modified code to use the new 1099-NEC Tax Year 2021+ specific form.

EFT processing Enhancements:

Added logging to EFT processes

- Added logging if a transaction in the EFT Batch was skipped due to being rejected or credit status.
- Added logging if manual deposit batches were created.
- Added logging when a manual run settlement batch happens.

Add an EFT setup option to enable funding batches

This allows customers to turn on the new funding flow if they want to use the feature. This option is turned off by default.

Allow deposit batches to be deposited if they have not been fully funded.

When an unfunded deposit batch is selected in the Payment Processing form a warning will be displayed letting users know the batch is not fully funded and could result in the inability to reconcile with Forte funding batches or deposit values. If the user clicks Ok to the message they will receive a prompt to change the batch status. This response will be entered in the SY_Edit_Log table.

When SedonaEFTService processes funding settlements, and the transaction has not been added to a funding batch, but has been deposited a message will be written to the log.

Sample log message:

"Transaction d298139a-fad0-4933-90d1-bdc91b5d943a was found in funding CC-1026-23456, but could not be added to a funding deposit batch because is has already been deposited."

Added a manual setup process trigger

Added a 'Settle' button to the EFT Processing Transaction form that will be visible when the Approved tab is selected and added a 'Settle' button to the Deposit list form next to the Export button. These additions will allow you to trigger the settlement process on batches and individual transactions.

Restored original Forte settlement flow to be completed before processing of funding entries

Processing of funding entries will only create funding deposit batches and move deposit checks associated with funding settlements into those batches. Funding entries will now be processed each time the settlement process is run to allow processing of any transactions that may have been orphaned when the funding entry was processed initially.

Set recurring_indicator to true for Forte transactions created from an RMR

This will indicate to Forte that transactions are a recurring transaction and could be subject to a more favorable rate.

Bugs

Note: Development ID is in parentheses (), Customer Case ID is in brackets []

Missing receipt causing out of balance GL. (17859) [12181]

Issue: Deleted receipts cause out of balance issue.

Solution: Created audit tables GL_RegisterLog, IN_ReceiptLog and IN_JournalLog to log receipt addition, update and delete transactions.

These audit tables can be used for troubleshooting issues for missing receipts.

[FAILED QA - back to DEV] Adding same part multiple times to a job, but part only displays once on the PO. (18125) [4263]

Issue: When the same part is on different lines on the materials tab for a job with the same location only one instance of the part is pulled into an PO. These parts may be in multiple tasks/phases of the job and need to be listed multiple times, they also need to be invoiced in each task/phase if the task they are assigned to is PO.

Solution: Implemented check if there is no location mentioned and same part is entered twice on one phase then it display part twice in PO.

Manually closed purchase orders do not update Inventory Stock Status Report "On Order" numbers. (18823, 19545)[9383,16862]

Issue: Inventory Stock Status Report is not updated with the On Order Quantity of a part when a purchase order is manually closed w/o receiving the part. Unreceived parts on closed purchase orders stay "On Order" forever.

Solution: When a purchase order is closed without receiving a part the On Order Quantity of the part is now zero.

[FAILED QA - back to dev] Customer emails keep being marked as invalid even after being updated and reset to valid. (18905) [15410, 19024]

Issue: Customer's email addresses are being automatically marked as invalid, I ran a query to update and mark all the email addresses as valid, when I check the next day, they have been set to invalid.

Solution: Updated to compare the sent email address with the customer bill email address. This is to check for the case where the customer bill email address has been corrected.

Cannot post bill to multiple GL Accounts. (19276) [18707]

Issue: When more than one expense line exists on an AP Bill that you have manually updated and you tab through the fields they are reverted back to GL account default amount.

Solution: Force grid control to occur in a predictable order, so when an expense amount related column value is changed, the proper values will be used in the calculations.

(IN QA) Reversal transactions in EFT Processing (v 6.1+) are not setting ACH_Id on AR_Deposit_Check. (19590) [19487]

Issue: Reversal transactions in EFT Processing (v 6.1+) are not setting ACH_Id on AR_Deposit_Check.

Solution: After creating an AR_Deposit_Check record for a Z-transaction, update the ACH_Id to be that of the corresponding AR_ACH record.

(IN QA) Reversal transactions in EFT Processing (v 6.1+) are not setting Invoice Description. (19591) [19486]

Issue: Reversal transactions in EFT Processing (v 6.1+) are not setting Invoice Description.

Solution: When creating an invoice for a reversed EFT transaction, set the invoice description to a predefined value.

- In SedonaSetup added a field to the AR Setup Processing form to allow specifying the EFT Returned Payment Invoice Description
- Added the Returned_Payment_Invoice_Desc_Code column to the AR_Setup_Processing table
- Modified stored procedure Setup_Processing_UPD to save the invoice description
- Modified ARSetupj.dll to get/set the invoice description
- Modified PaymentProcessing.dll to set the invoice description, when creating a charge-back invoice

(IN QA) Receive error 65526 when logging into second company. (20325) [22401]

Issue: Receive error message "65526 No error message available" when logging into a second company.

Solution: Added error handling to the Manitou.GetCompanyId function, to catch errors when calling the Manitou dll.

Cannot run the Problem Codes List. (20372) [22773]

Issue: Run-time error 91: Object variable or With block variable not set message when trying to run The Problem Codes Report.

Solution: Redesigned the report.

(IN QA) Error received on parts updater due to new fields in Part Edit Screen. (20375) [22830, 22860, 23734, 23884, 24126]

Issue: Receiving error message "Error: 5 Procedure or function 'Part_UPD' expects parameter 'Alt_sales_description', which was not supplied."

Solution: Added default values for the new stored procedure Alt_Description parameters. This will allow existing applications (such as PartsUpdater) to use these stored procedures without modifying the code that calls them.

Unable to create a service ticket and view complete equipment list (20381) [21143]

Issue: Errors received when viewing equipment list or creating a service ticket for and equipment part with an apostrophe.

Solution: Allow creating a service ticket and viewing equipment list for equipment part with an apostrophe.

Invoice printing of "Install Charges" should be in French for form CS53FR (21099)[24984]

Issue: When using the billing rollup for Install invoices, invoices print with the words Install Charges on the invoice due to rolling up the install charges and parts. The words Install Charges are fine only they MUST be in French.

Solution: Added condition to allow "Install Charges" to print in French when printing in French.

Job Queue Search does not take you to the correct job number. (21457) [23410,24168]

Issue: When typing the job number in the search it does not take you directly to the correct record. A similar job number is highlighted and you have to navigate through the pages to find the correct job.

Solution: Typing in the full job number in the search will take you directly to that number and highlight the number.

When custom field is blank on Sedona-X mobile app and saved/changed it corrupts custom field page in Sedona. (21647)[25580]

Issue:

Solution:

Runtime error on Branch Setup if email template ID does not exist. (21876) [Internal]

Issue: Runtime error when the Email_Id_Field in AR_Branch does not have a corresponding record in EM_Template

Solution: Changed code so it does not try to parse an email template that does not exist.

[IN CA] Forte funded batches being created with no deposit checks. (22206) [28505]

Issue: When a customer first updates to SedonaOffice v6.2.0.2, the nightly processing of any Forte funding data which contains transactions that were settled before the update results in the creation of a funded deposit batch that contains no deposit checks.

Solution: Modified SedonaEFTServer to create a funded deposit batch only when a non-settled transaction is encountered. Created a script that will be run by the installer to delete any funding deposit batches with no deposit checks that were created by build 6.2.0.2.

Invoice line amount is removed when tabbing from the Amount column. (22273) [Internal]

Issue: When creating an invoice and clicking on the Amount field, the Amount is zeroed out.

Solution: Set the Amount column to text in the gridParts control in the Parts tab.

Issue with PO that was closed but has shown up again. (22414) [28013]

Issue: Service Module allows blank PO numbers which causes issues.

Solution: Force user to enter a PO number and added checking for duplicate PO number.