



# SedonaOffice Release Notes

January 2025

Version 6.2.0.19 **INTERNAL COPY**

**SedonaOffice**<sup>®</sup>

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**IMPORTANT NOTE for SedonaOffice version 6.2.0.19. There is a revision 2 update that includes several fixes. Be sure to install this update. In addition, you must update to the latest version of SedonaWeb/SedonaAPI 2.0 (version 1.49.0) due to credit card processing changes.**

## Enhancements/Features

### 51755 & 51696 Added Support for Level 2 Credit Cards Processing

We made changes to add level 2 credit card processing. These changes include adding the Procurement Code to credit card information and sending the invoice number, tax amount, and procurement code to the Forte transaction.

Users will see these changes on the Customer Payment Methods screen, Credit Cards tab:

Customer Payment Methods - SODb1 - Forte

Customer Number: 10105  
Testing Bug 21531  
1234 Bug Ln  
Statesville, NC 28625  
(704) 880-2377

Bank Accounts | Credit Cards

Cards On File: MAST

Card Number \*: \*\*\*\*4444

Expiration \*: 10 / 29

Card Type \*: MAST

Procurement Code: [Text Field] P-Card Allowed Use:  Invoice:  Advance Deposit:

Payment Method \*: MasterCard

Auto Processing:  Recurring  Non-Recurring

Hold Day: 1 Max Amount: \$0.00

Days Past Inv Date: 0

Auto Bill To Recurring: [Text Field]

New Save Delete Close

**Procurement Code:** This allows 17 characters (letters and numbers)

P-Card Allowed **Use Invoice** checkbox and **Advance Deposit** checkbox.

When users enter payments, they will see if the selected card is a procurement card. They will also see when they selected a procurement card if it is allowed to be used for invoice payments or advanced deposit payments. If the procurement card is not allowed to be used, they cannot save or submit the payment.

Any messages in SedonaOffice for procurement cards use “allow” or “allowed” instead of “authorized” to avoid confusion with status messages related to Forte.

## **51140 Enforce Site Level, Required Custom Fields For New Customers [00112506]**

When creating a new customer, the required fields for Sites in Custom Fields were not enforced. We added the Site Custom Field Tab to new customers so that the required fields are enforced.

## **Application Corrections**

### **Accounts Payable**

#### **54310 Write Checks Locked after upgrade to 6.2.0.18.18 [00125425, 125952]**

We fixed an issue with the write checks function that would not allow other users to use the function after one user wrote a check.

### **Accounts Receivable**

#### **42799 Journal entry for Advance Deposit missing job number [00095542]**

The Journal Entry for Advance Deposit when using Unapplied Cash did not show the selected Job number. We fixed this by adding the Job Number to the Journal Entry.

### **Client Management**

#### **36677 Clear Criteria Button Hangs up Search [00083726]**

Doing a search and clicking the Clear Criteria button disabled the Add Criteria button and stopped the search from working. Users needed to close the search and reopen it to get it to work again.

We fixed this issue so that using the Clear Criteria button resets the search and allows the search to function as expected.

### **53115 Default for new customer doesn't save [00121465]**

When saving a new customer and not clicking the site, the site would default to commercial even if the default was residential. We fixed this by saving what was used on the first tab.

### **53730 Type 13 Mismatch on Payment Options [00124604, 124526, 124450, 124517,124727,125579, 124863, 124999,125390,125747,125893, 126436]**

We resolved an issue found when users clicked on Payment Options on the Customer Record. There was a type-13 mismatch error, and the customer payment methods would not load.

## **Job Management**

### **51760 When entering Job numbers, it takes a long time to populate the information [00116888]**

To improve the time for populating job information, we temporarily disabled the job list display while the list is filtering.

### **53110 Job Queue - Unscheduled Jobs - Run-time error [00121680]**

We fixed an error that occurred if Customer Group Security was enabled and in the job queue users clicked the unscheduled jobs to review them.

## **General Ledger**

### **53176 column issues in new tools reports [00122006]**

We removed the Reason codes for Sub Totals and Grand Totals as these did not add value and were confusing.

### **53971 Tool for finding GL out of balance not working [00125577, 123974]**

When running the tool, the resulting report is blank. The tool will not return results if there are NULL values in the Amount columns for the GL\_Register table. We modified the tool to replace NULL values with zeros. We also improved the response time for the tool, so it runs faster. Finally, we removed the Reason codes for Sub Totals and Grand Totals.

## **Report Manager**

### **35844 User password should not be stored in ReportParam.txt file [00080670]**

When running a report that populated the ReportParam.txt file, the user's username and password appeared in the text file. We corrected this issue.

## **Service**

### **52082 Cannot see Signature Line in SO that was saved in Sedona-X [00059452,111615]**

We fixed an issue where users could not see any signatures on Service tickets>Billing in SedonaOffice when their customers signed the terms and agreements in Sedona -X Service tickets.

## **Setup**

### **54000 User Front End has stopped working - EFT Customer [00125059]**

When users selected EFT Customer, there was a "User Front End has Stopped working" error and "Visual Studio Just-in-time debugger" error that forced SedonaOffice to close.

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## **Stored Procedures**

### **New Stored Procedures**

None for this release

### **Updated Stored Procedures**

- ACH\_Cycle
- Auto\_CC
- Auto\_CC\_Store
- Customer\_CC\_Add
- Customer\_CC\_GetAll
- Customer\_CC\_Refresh
- Customer\_CC\_Upd
- Customer\_CCs\_Get
- FSU\_CreditCard\_Add (where calling web\_Customer\_CC\_Add)
- FSUV3\_CreditCard\_Add (where calling web\_Customer\_CC\_Add)
- GetAutoNonRecurCC
- SEFT\_Get\_ACHTransactions
- SEFT\_Get\_ACHTransactionsByTraceNumber
- SEFT\_Get\_ACHTransactionsByID
- SEFT\_Get\_Customer\_CC
- web\_Customer\_CC\_Upd
- web\_Customer\_CC\_Add
- web\_Customer\_CC\_Refresh

## **Database Tables**

### **New Database Tables**

None for this release

### **Updated Database Tables**

- AR\_Customer\_CC
- AR\_ACH

## Special Upgrade/Installation Instructions

If you are using Sales Automation, refer to the [AlarmBiller v4.51.0 product release notes](#) for Sales Automation changes.

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 (version 2.7.80 or earlier) with SedonaOffice version 6.2.0.8 or earlier, we recommend that you transition to using SedonaWeb 2.0. (Note: Legacy SedonaWeb 1.0 version 2.7.81 is compatible with SedonaOffice 6.2.0.9 or later.)

**SedonaWeb/SedonaAPI 2.0 Setup** — If your company uses the SedonaWeb/SedonaAPI 2.0 in any manner (Sales Automation, Time & Attendance, eForms, or the SedonaAPI for integrations such as the Manitou integration), IT will update your SedonaWeb/SedonaAPI version at the same time as your SedonaOffice version. This is to ensure compatibility with the Sales Automation module.

**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.

**To Use TLS 1.2** — Consider the following:

- All computers running SedonaOffice client must be on Windows 10 with the October 20, 2020 build, version 17763.1554 or later; the server must be on Windows Server 2019 or later.
- TLS 1.2 must be the only TLS version enabled in the Registry. TLS 1.0 and TLS 1.1 must be disabled. Verify that they are disabled and that TLS 1.2 is enabled.
- The SQL Server must be set to force encryption.

## Supported Environments

### Minimum System Requirements

- Server is on Microsoft .NET 4.6.1
- If used, SedonaWeb/SedonaAPI 2.0 version 1.49.0 (or higher)

## **Internal Changes (not on customer release notes)**

### **17652 Address lines missing from printed PO when address line 3 is used**

If a vendor was defined with Address Line 1, Line 2, Line 3, City, State, and Zip Code fields populated, when a purchase order was printed to the vendor the city, state, and zip code line did not appear.

Sections were overlapping. To resolve this, we added spacing for vendor information on the PO Print Preview report.

### **48593 Problems adding address to warehouse**

Country and Township were saving to a 'blank' record ID in the IN\_Warehouse table. These should be saved to the N/A record instead.

We removed 'blank' records in the GE\_Table4 and GE\_Table5 and changed ID to 1 for GE\_Table4\_Id and GE\_Table5\_Id in IN\_Warehouse.

### **54269 Bug in Tool for finding GL or of balance**

Fixed a bug to allow the date selection to work properly.

### **54500 Issue with Invoice Printing - latest release 6.2.0.18 Rev 5**

Print preview of invoices just shows blank. Also using Print to PDF does not display the PDF it just immediately displays the message asking if all Tagged invoices printed correct and should be marked as printed.

Found that the release build was picking up the ReportBatch.dll from the \_work\4 directory rather than \_work\1 as it should. This is because the report batch project was changed after the release/6.2.0.18 branch was cut (so the DLL was newer than the one in .18) and ReportBatch.dll was in the build machine registry and the report project files had the wrong version in the reference for that DLL.

### **53994 Add customer tree error logging**

Added customer tree error logging to help track down Payment Options problems in builds after 6.2.0.18 Rev 1. This includes these:

Added "VB location" strings to the customer tree function so the exact location of an error could be determined.

Increased the size of SY\_ErrorLog.VBLocation to accommodate the length of the new strings.