SedonaAPI Release Notes

September 2022

Contents

Enhancements/Features

Ensure role group permissions are applied correctly

Verified that SedonaAPI controllers are applying permissions correctly and updated permissions to match Sedona-X Mobile roles.

Customer Portal Features

There are changes to the Customer Portal that allow company-level users to specify which functionality is available to customer-level users when they log in to the Customer Portal. The functionality is specified by new preferences with names that begin with "Customer Portal". These are the preferences that can be enabled or disabled (by default, all of these are enabled):

- Site Listing - Ability to allow or disable access to the site listing page
- RMR - Ability to allow or disable access to the RMR listing page. If access is disabled, ensured users cannot view RMR from a site/system either
- Invoices - Ability to view or prohibit viewing invoice details when opening the invoice
- Payments -
    - Ability to allow or disable add/edit/remove payment methods
    - Ability to view or prohibit viewing payment history
    - Ability to pay or prohibit paying invoices
- Service -
    - Ability to access or block access to the service area of the portal
    - Ability to view or prohibit viewing service ticket details by opening service tickets
    - Ability to create or prohibit creating service tickets
- Documents - These feature flags apply to the main documents area controlling the documents associated with the customer, as well as any documents that pertain to sites or systems
    - Ability to access or block access to documents within the portal
    - Ability to upload or prohibit uploading documents

These settings are on the Company Preferences:

Company/Branch Preferences

Branch | Company Preferences ▾

Drag a column header and drop it here to group by that column

Name ⋮	Description ⋮	Value ⋮
Customer Portal - Create Service Tickets	Customer Portal - create a new service ticket	true
Customer Portal - Documents	Customer Portal - access Documents	true
Customer Portal - Invoices	Customer Portal - access Invoices	true
Customer Portal - Pay Invoices	Customer Portal - pay invoices	true
Customer Portal - Payment History	Customer Portal - access Payment History	true
Customer Portal - Payment Methods	Customer Portal - access Payment Methods	true
Customer Portal - RMR	Customer Portal - access RMR	true
Customer Portal - Site Listing	Customer Portal - access Site Listing	true
Customer Portal - Upload Documents	Customer Portal - upload Documents	true
Customer Portal - View Service Ticket Details	Customer Portal - view service ticket details	true

⏮ ◀ 1 2 3 **4** 5 … ▶ ⏭ | 10 ▾ items per page

Company/Branch Preferences

Branch | Company Preferences ▾

Drag a column header and drop it here to group by that column

Name ⋮	Description ⋮	Value ⋮
Customer Portal - View Service Tickets	Customer Portal - view service tickets	true

These settings correspond to the menu items:

🏠 Home | 📍 Site Listing | 🔄 RMR | 📄 Invoices | ⬛ Payments ▾ | 🔧 Service ▾ | 📖 Documents | ⚙ Settings ▾ | ⏏ Logout

Current Balance 💲

$15,369.60

Make a Payment

Last Payment: $75.00
Received on: 10/7/2021
Amount Past Due: $15,423.56

Service Tickets 🔧

You Have 1 Open Service Tickets

📄 View Open Tickets
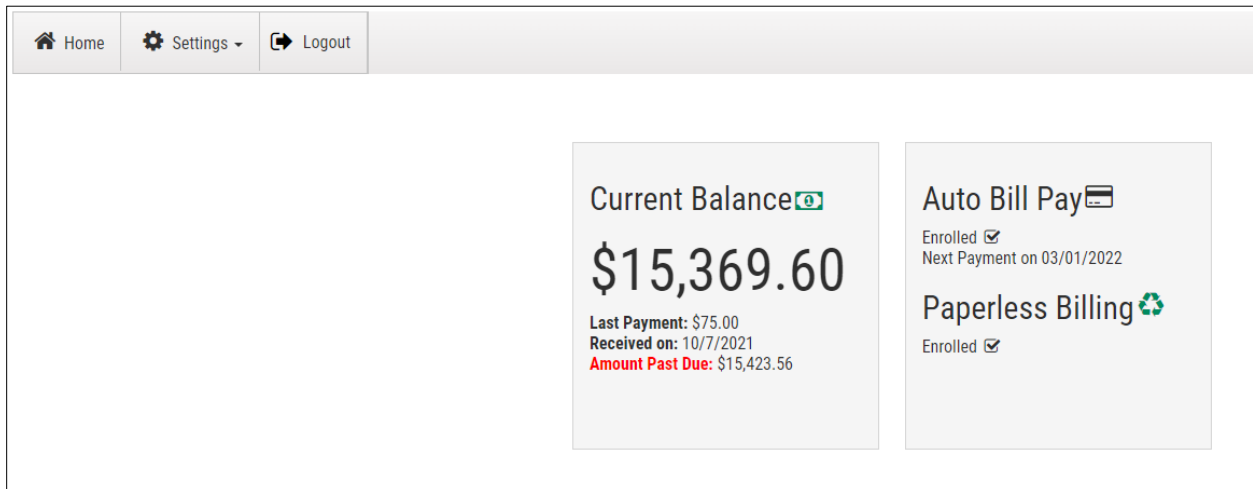
⊞ Create Service Ticket

Auto Bill Pay ▭

Enrolled ☑
Next Payment on 03/01/2022

Paperless Billing ♻

Enrolled ☑

The preferences also affect items displayed or selectable throughout the portal. For example, with all the permissions disabled, the home screen looks like this:

With the preferences disabled, the home screen is changed like this:

- When the Invoices permission is false, the current balance dollar amount no longer links to the open invoices.
- When the Pay Invoices permission is false, the Make a Payment button is gone.
- When Create Service Tickets and View Service Tickets permissions are false, the entire Service Tickets box is gone.
- When the Payment Methods permission is false, users cannot change enrolled status of the Auto Bill Pay field. Enrolling takes the user to the payment methods to choose which one to use for autopay.
- When the Pay Invoices permission is false, users cannot change the enrolled status of the Paperless Billing Enrolled field.

There is an existing host-level preference for creating service tickets. Both company and host preferences must be enabled to create a service ticket. If the host preference is disabled, the company preference is ignored, and service tickets cannot be created in any company.

The Customer Portal has these other changes:

- Corrected several forms that had an incorrect title displayed in the browser tab.
- Corrected the invoice details item list table. Changing pages refreshes the items and properly displays the selected page.
- Changed payment history to include invoice payments only. (Formerly it was showing all payment types)
- Changed payment detail screen to show the correct information.
- Resolved an issue with adding bank accounts if the customer's name was more than 22 characters.

- Resolved an issue with adding a master account credit card through the portal that caused a not found message after submitting the credit card information.

Application Corrections

Resolved Issue
SA Parts sync endpoint not returning correct parts list for 'Available for Sales' = false
Fixed the repository query to add the correct WHERE clause when the incoming request is for 'Not Sales Part' part records.
/api/app/customers POST not populating Customer Bill email
Changed the post payload to customer entity model mapping to populate the new customer bill to model with the email from the post payload.
New Payment Processing DLLS for Capture Transaction fix
Resolved issues capturing transactions for payment processing.

SedonaAPI

Resolved Issues
Sedona-X Mobile License Error
Changed the API to only check the Sedona-X License number if the user was not already a Sedona-X Mobile user.
Sedona API allows Customer record to be created without sending the BranchID
Changed the API to require the BranchID when creating a customer. Read Changed API Endpoints for the changes to the API.
Sedona API allows Term code 1 to be used
Changed the API to use only valid Term codes. Read Changed API Endpoints for the changes to the API.
Sedona API allows NULL for Bill To Address Line 1

Resolved Issues
Changed the API to not create a bill to record and a customer record if the Bill To Address Line is missing. Read [Changed API Endpoints](#) for the changes to the API.
Sedona API POST api/customerbill returns 201 response when record is not created Changed the API response for the POST api/customerbill when a record is not created. Read [Changed API Endpoints](#) for the changes to the API.
State code not populated based on zip code ID sent Changed the API to populate the state code based on the zip code. Read [Changed API Endpoints](#) for the changes to the API.
API Allows NULL to be passed to Phone but that is not valid for the field and causes errors if you try to open the customer record in Sedona Changed the API to resolve the issue of the API passing NULL values that was causing errors with customer records in Sedona. Read [Changed API Endpoints](#) for the changes to the API.
API - Post Customer Document with Job and System does not create document Changed a validation: the SedonaSystemId was being run regardless of whether it was required. Now if JobId is passed in, then the SedonaSystemId is ignored.
Sedona-X Service Report Option Broken Resolved an issue with the Service Report that was causing the mobile app to crash.
POST/Credit taxable request not returning taxed amount in 201 Response The API was updating the taxes; however, the database repository was not registering the tax update. To resolve this, the tax update changes are reloaded after they are calculated.
Default role groups have changed what's assigned to them Corrected AspNetRoles: PATCH action was not accommodated - corrected. CustomerController template route was [controller] instead of Customer - corrected. Corrected endpoint processing to process endpoints only once per group, applying the endpoints to each instance of the group.

Resolved Issues
Corrected route names by adding functionality to update the role description when the route name is changed in a controller.
Added exclusion of endpoints that are hidden from public use.
Found and corrected a problem caused by a change in June 2021 that could cause fixed role groups to erroneously have permissions removed upon SedonaCloud startup.
Added permissions for fixed role groups Project Manager and Manager to:

- Post Customer2
- Update Customer2
- Post CustomerBill2
- Update CustomerBill2
- Post CustomerSite2
- Update CustomerSite2
- Post CustomerSystem2
- Update CustomerSystem2

Customer Site update fails when using a 2-character State Abbreviation

Changed the API to use the 2-character state abbreviation. Read Changed API Endpoints for the changes to the API.

API issue Customer Recurring does not allow negative

Changed the API validation to allow a negative amount. The validation will display an error only if the amount is zero.

Changed API Endpoints

Note: These new endpoints correct many problems found in their corresponding obsolete endpoints. If you have an existing integration using the obsolete endpoints, you will not benefit from these changes until you modify your integration to use the new endpoints. If you are experiencing problems with an obsolete endpoint, you must modify your integration to use the new endpoint.

Added the following endpoints:

- POST /api/Customer2
- PUT /api/Customer
- POST /api/CustomerBill2
- PUT /api/CustomerBill

- POST /api/CustomerSite2
- PUT /api/CustomerSite
- POST /api/CustomerSystem2
- PUT /api/CustomerSystem

In Swagger documentation, the following endpoints are marked as obsolete:

- POST /api/app/Customers
- POST /api/Customer
- PUT /api/Customer/{id}
- PATCH /api/Customer/{id}
- POST /api/CustomerBill
- PUT /api/CustomerBill/{id}
- POST /api/CustomerSite
- PUT /api/CustomerSite/{id}
- POST /api/CustomerSystem
- PUT /api/CustomerSystem/{id}

Added full documentation in Swagger for the model properties of the new create and update models associated with the new endpoints.

Changed POST /api/CustomerSystemSwap to not allow that on a system that is integrated with an alarm monitoring system.

Added IntegrationId, IntegrationDescription, and CSSystemLabel properties to AlarmCompany model. When using the GET /api/CSAlarmCompany, the integration information is supplied so you can determine the proper alarm company to supply for a customer system.

Added AutoCreateCustomerNumber, AutoCreateInvoiceNumber, AutoCreateJobNumber, CustomerGroupSecurity, DfltCustomerGroupId, RequireSystemAccount, and RequireUniqueSystemAccount to ARSetup model (GET /api/setup/AR).

Corrected CollectionStatus view model, which had the Inactive boolean property tagged as a string, that caused the model validation to throw an error every time POST or PUT /api/CollectionStatus was hit, which resulted in a 500 error to the caller.

ServiceLevel view model had same problem as CollectionStatus view model and was corrected.

ContractForm view model had same problem as CollectionStatus view model and was corrected.

Warranty view model had same problem as CollectionStatus view model and was corrected.

SedonaWeb

Resolved Issues
SedonaCloud SedonaWeb Payment Confirmation Typo Corrected the spelling to "Payment successful!" on customer and master customer payment forms in SedonaWeb 2.0.
Service Report Generation crashes mobile app and does not generate or upload a pdf document. Resolved an issue that was crashing the mobile app and not generating a PDF document. This was happening when there was not a logo in the SedonaCloud company. Now the Service Report Generation generates and uploads a PDF document even if there is not a logo to use.
Clients cannot create SedonaWeb users Resolved an issue that was preventing clients from creating SedonaWeb users. (**Note**: This requires an update to SedonaOffice 6.2.0.8.)

Special Upgrade / Installation Instructions

If your company uses the SedonaCloud API, IT will update it at the same time as your SedonaOffice upgrade. This is to ensure compatibility with the modules using SedonaAPI.

Supported Environments

- This version of SedonaAPI requires SedonaOffice version 6.2.0.8.
- Minimum System Requirements: Server is on Microsoft .Net 4.6.1