



SedonaOffice
Release Notice for
Version 6.1.0.42

July 2020

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About This Document

This document provides information related new enhancements and software corrections for SedonaOffice version 6.1.0.42.

Special Upgrade / Install Instructions

If upgrading to SedonaOffice 6.0 and higher, 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

Minimum System Requirements:

Server is on Microsoft .Net 4.6.1

Features and Enhancements

Accounts Receivable

Forte SEC Code for ACH Transactions

Description: As part of a new industry standard, ACH transactions require a Standard Entry Class code, or SEC code. This small feature was to add the SEC code to each ACH transaction submitted to Forte.

Application Corrections

Accounts Receivable

EFT Processing Permission

Issue: Users must have ability to send EFT in order to be able to add credit cards and create live transactions. Customers should be able to assign everyday users to be able to create EFT transactions without also giving them the ability to submit them. Issue did not appear in prior versions due to the need for an FTP profile. Currently, any user who has access to EFT processing can send transactions to Forte.

Solution: Modified the EFT Processing permissions so the new payment processing works the same as the old payment processing. This allows users with EFT Customer permission to add payment methods and to create EFT transaction, without giving them the full capabilities of EFT Processing.

Trim Spaces from Account Numbers in EFT Processing

Issue: Need to trim white space from EFT parameters, including credit card numbers, bank account numbers and routing numbers.

Solution: Trimmed white space from bank routing numbers and account numbers.

Accounts Payable

Write Off Vendor Returns

Issue: When trying to write off a vendor return that was posted in a currently closed accounting period by saving with the 'No Bill/Credit Expected' checked, the journal entry that should be created for the return is not being created.

Solution: Ensured that the journal entry to write off the return is posted even when the return was posted in a currently closed accounting period.

Comdata Integration Vendor Issue

Issue: The vendor connection between the two databases was not successful, causing many features to not function correctly. The logs for these errors were not functioning either, making it difficult to pinpoint the exact issue.

Solution: Resolved the logging issues and ensured that the Vendor Code length requirement matched between both databases so that SedonaOffice vendors can resolve with Comdata correctly.

Job WIP Issue

Issue: Because users can edit items on AP Bills, Part Receipts, Vendor Returns and AP Checks that are attached to closed jobs, closed jobs can get unresolved WIP due to the editing of the items attached to that closed job.

Solution: Disabled editing and deleting of AP Bills, AP Checks, Part Receipts and Returns, and Job Part Issues if they are linked to a job that has been closed and has WIP amounts applied.

Client Management

Commercial/Residential Swap

Issue: When creating a customer, if the commercial/residential selection is different for the bill to and site, if you are not careful creating the customer, it will auto switch the site to match the selection for the customer.

Solution: Change the Site's Commercial/Residential type only when the site tab is first selected in the customer wizard.

Unknown Error When Adding Already Existing Customer Document

Issue: A user receives an unknown error trying to add a document to customer. Issue is the document is already on customer but the error message is too vague.

Solution: When the SedonaDocuments stored procedure returns an error, return that error to SedonaOffice user.

Customer Query Builder

Customer/System Critical Messages

Issue: When building a query with the Customer Query Builder, and selecting the Customer Critical Message field, records being returned included System Critical Messages as well. We need to make sure that this field only pulls in the customer critical messages.

Solution: When querying for customer critical messages, exclude system critical messages.

Inventory

Part Special Character Issues

Issue: When adding new parts to SedonaOffice, special characters can be included in the part code, part description, part detail, vendor part code, vendor part description, and/or vendor part detail. These special characters cause various issues ranging in severity.

- Prevent users from being able to open the part in explorer mode
- Prevent the part from being edited
- Prevent the part from being added to purchase orders
- Receive an error when attempting to receive a purchase order
- The Parts Updater cannot find the part
- The ADI integration cannot read the purchase orders we send them

Solution: Added validation of part code, description, etc. for special characters before saving the part. An error message is displayed and the user is required to reenter the offending data.

Part Performance

Issue: This issue was particularly affecting companies that have a large number of parts in their database, which was causing issues with performance on functions that process parts.

Solution: Moved a maintenance procedure that was being called when the journal was added from being ran while processing parts, which reduced the performance load.

Job Management

Job Invoicing

Issue: Users receive a generic error when trying to create job invoices with RMR on them because the invoice is trying to create the RMR line, which it cannot do because the job system is missing.

Solution: When saving a job RMR invoice, check that the job system is valid and, if not, provide proper error handling to notify the user.

Service

Inspection Ticket Date not Updating

Issue: When a ticket was resolved, the Next Inspection Date was not updating.

Solution: Ensured that when resolving a ticket, the Next Inspection date increments properly.

Report Manager

Open Ticket Costing Report Routes Error

Issue: Report needs to be corrected to compensate for people that have tried using routes and then turned it off. This resulted in some systems have an assigned route and some do not. Currently, the report can only read where all customer systems have routes or no customer systems have routes and gives bad data if it ever finds a customer that has had routes but currently does not.

Solution: In SedonaSetup a new option, Disable Service Routes, has been added to the Service Setup Defaults. This option defaults to enabled, so users will see no difference in the operation of routes unless they change this setting. When service routes are disabled, the Disable_Routes column in the SY_Setup table will be set to 'Y'. In addition, the Route_Id columns in the SY_System, SV_Service_Tech_Routes, and GE_Table3 tables will be cleared (i.e. set to 1). This will cause all new service tickets and inspections to be created without a default service route. If the "Remove Routes from Existing Data" check box is also checked, the Route_Id columns in the AR_Customer_System, SV_Inspections and SV_Service_Ticket tables will be cleared of all existing records, and all routes will be deleted from the SV_Routes table.

Report Control Limitation Issue

Issue: List controls were limiting older reports from loading their entire results if the data set was past the limit.

Solution: Updated the controls from the intrinsic VB list controls to a ListView control with a much higher item limit. These reports should now have no problems.

SedonaSetup

A new checkbox was added to the General Setup tab of the Service Setup Defaults. This checkbox labeled Disable Service Routes, would be used if your company had previously been using Route Scheduling and then decided to use Technician Scheduling. When checking this box, another form will appear giving the user the option of removing route data in your company's database.

