SedonaOffice
Release Notice for
Version 6.1.0.51

October 2020

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CONTENTS

About This Document

This document provides information related new enhancements and software corrections for SedonaOffice version 6.1.0.51.

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

Add Logging to PCI Compliance Update

Objective: This adds logging to the Forte service request and response when tokenizing accounts.

Application Corrections

Accounts Receivable

American Express Eclipse Payment Batches

Issue: Sedona and Eclipse (third-party application) do not treat American Express the same way. Sedona abbreviates American Express as AMER and Eclipse uses AMEX. When Sedona creates the payment batch it does not place it in the American Express payment batch but puts it in a random batch.

Solution: Ensure that any payment batches created with the card of type AMEX is added to AMER batches to agree with SedonaOffice.

ACH Invoice Reflecting Full Amount after Partial Payment Applied

Issue: If a user partially pays an invoice, the EFT transaction is for the correct amount, but the AR records pick up the full amount of the invoice. If the transaction then becomes previously funded/refunded, the negative transaction is processed through Forte at the full amount of the invoice instead of the payment amount.

Solution: Resolved the AR records to pick up the amount due on the invoice, not the full amount of the invoice.

Deposit Checks Not Being Created

Issue: Credit card payments were processing and showing in the EFT history, but were not creating payments, leaving the invoice still open.

Solution: Ensure that the payment is properly created for credit card payments.

Statement Spelling Typos

Issue: The word 'Credit' was misspelled as 'Cedit' on custom statement C01.

Solution: Fixed the misspelling of 'Credit'.

EFT Connection String Issue

Issue: SedonaOffice requires a default instance of sql server. Migrating customers over to AWS means that we need to use an Alias for a named sql server instance to connect to SedonaOffice. This is working for connecting to SedonaOffice, but for some reason the EFT Process cannot make a connection to SQL server.

Solution: Allow overriding the server name with the server instance name.

SedonaEmail

Issue: When trying to run SedonaEmail on a system referencing a named instance database, the program errors.

Solution: Added support for named instances of database servers to SedonaEmail and SedonaComdata.

Accounts Payable

Negative Expense Line on PO

Issue: When entering a negative quantity in an expense line on a Purchase Order, the user is presented with an error: 'Run-time error 11 Division by 0'.

Solution: Allowing the quantity to be negative on purchase orders so that the rate can be divided by the quantity.

ComData AP Checks Missing GL Account

Issue: When creating AP checks using the ComData interface, AP checks were missing the account code, as well as the GL entry for them were missing an account code on the credit side.

Solution: In the SComdata_PostPayment stored procedure, get the account code from the GL_Account table, rather than from the AR_Bank table. They may not be the same.

ComData PCI Compliance

Issue: The ComData AP Integration stores PCI compliant information in the SO database.

Solution: Ensure that any log or function utilized with this integration does not store PCI compliant information anywhere within the SedonaOffice database.

Client Management

Search Feature Crashes Application

Issue: SedonaOffice crashes due to the Customer and Vendor Search feature being utilized. This is being caused due to a few things, most predominantly noticed when hitting the 'enter' key in the search feature.

Solution: Implemented tests to find causes for the crash and added fixes for the found perpetrators.

Customer Search

Issue: The Search form was displaying incorrectly.

Solution: Resolve the display for the search form.

No Tracking for Credit Card Deletion

Issue: Customer event log no longer tracks when a credit card is edited or deleted.

Solution: We need to ensure that if a user edits or deletes a credit card on a customer in SedonaOffice, that edit or deletion gets tracked/logged in the customer event log.

Cannot Make EFT Payment from Customer

Issue: Users were experiencing an error when trying to pay an invoice from a customer record.

Solution: Fixed the registration of SedonaPaymentCom.dll on Compiler, which will ensure the ability to create payments from a customer record.

FSU (Field Service Unit)

Cannot Utilize FSU Appointments

Issue: Some FSU value types in the database were incorrectly set, causing an error that restricted the use of FSU appointments.

Solution: Changed the value types in the database to their correct value type.

Inventory

On Hand Inventory Value Calculation

Issue: If users had parts that were not assigned to a warehouse, then created a direct expense PO for that part, received the part as a direct expense to a job, returned the part from that job to stock in the warehouse that didn't already have the part assigned to it, the on hand quantity being calculated for that part in the warehouse would be doubled incorrectly.

Solution: Fixed the Part_Journal_ADD stored procedure so that it will not update twice the on hand quantity and on hand value, if adding a new part to a warehouse.

Job Management

Job Material List Part Price Issue

Issue: When issuing parts to a job that are not already on the materials list, the parts are being added to the material list with a $0.00 price.

Solution: We need to make sure the parts posted to the materials list are posted with the sales price setup for them in part setup.

Manitou Integration

SedonaOffice Manitou Integration

Issue: There were impediments blocking the SedonaOffice Manitou Integration from functioning properly and as intended.

Solution: These issues were identified through careful and extensive testing and addressed thoroughly.

Manitou Integration Site Address Update

Issue: When updating the site address in SedonaOffice for an account that is attached to Manitou, after saving the address update, users are met with an error and the address on the account in Manitou is not updated.

Solution: Ensure that SedonaOffice users are not met with an error when updating site address for account connected to Manitou, as well as ensure that the Manitou account is updated.

Service

Improper Ticket Parts Issue

Issue: A problem was reported for companies that are using WIP for service parts (SedonaSetup/Service Setup Defaults/GL Setup tab) and the Service Company for the ticket is flagged to expense inventory on tickets.

- A part is put on a ticket to come out of a warehouse in one accounting period, then that period is closed. The part is relieved from inventory and goes into the WIP account.
- In the next open accounting period, the user un-checks the issue from stock checkbox for the same part and saves the record. The software removes the part from the ticket journal.
- Return to the same part line and check the issue from stock checkbox and save. This causes the part to be issued from inventory but doubles the number of parts being returned to stock.

Solution: Modified stored procedure Service_Ticket_Part_UPD to not create a reverse journal entry if the part is not being taken from stock.

Bank Payments Created From Service Module Error

Issue: Bank transactions created by the service module are not picking up correct payment information resulting in errors and orphaned transactions.

Solution: Ensuring the bank achDirectToken property is not cleared when paying an invoice with a bank transaction.

Miscellaneous

Fix Named Instance Server Connection Issues

Issue: Many .Net applications fail to connect to a named instance database server.

Solution: Moved the named instance server resolution into Combase.dll. Modified SedonaEmail and SedonaComdata to use the Combase version of the server resolution. Added support for named instance servers when creating connection strings for reports. Modified the AP Aging Summary and AR Branch Aging reports, to match all other reports that use the ReportParam.txt file.

SedonaOffice Installer Issues

Issues: Issues included a named instance update issue and a server version update issue.

Solution: Each issue was resolved.

Fix SedonaOffice Connection Manager dll

Issue: The SedonaOfficeConnectionManager dll is using the ConnectionString column value to build the connection strings for the company databases.

Solution: The connection string needs to be constructed from the values in the ComputerName and DataSource columns instead.