



SedonaOffice
Release Notice for
Version 6.1.0.53

December 2020

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Acknowledgments

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About This Document

This document provides information related new enhancements and software corrections for SedonaOffice version 6.1.0.53.

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:

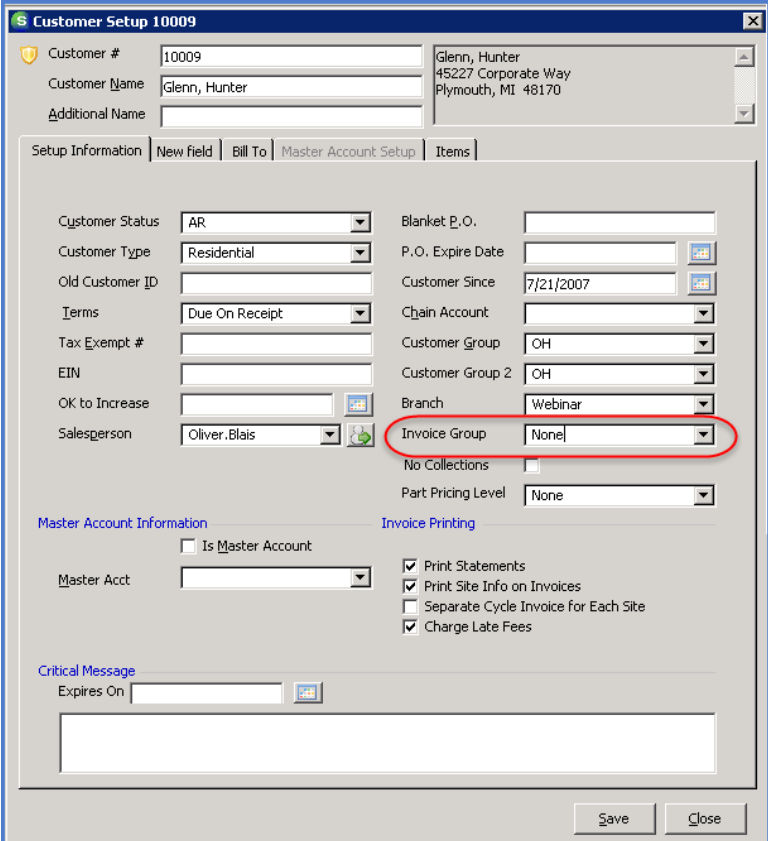
Server is on Microsoft .Net 4.6.1

Features and Enhancements

Client Management

Customer Invoice Group

Description: A new field, Invoice Group was added to the Customer Setup form. This allows you to set the default invoicing group for any new recurring lines that are created for sites and systems linked to the customer. If no value is selected, the default invoice group of 0 will be saved to the customer.



SedonaSetup

Invoice Groups

A new setup table, Invoice Groups has been added to AR section within SedonaSetup. Invoice Groups are used on the customer setup form and on the recurring line data entry form. Prior to version 6.1.0.53, there were ten invoice groups available, being zero through 9. Users may now add additional Invoice Groups as well as change the label displayed for each of the existing groups.

To be able to access this new setup table, user permissions need to be granted for their user group.

Number	Name	Description	Inact...
0	None		N
1	CC 1st of Month	CC 1st of Month	N
2	ACH 1st of Month	ACH 1st of Month	N
3	CC 15th of Month	CC 15th of Month	N
4	ACH 15th of Month	ACH 15th of Month	N
5	Group 5	Group 5	N
7	Group 7	Group 7	N
8	Arrears Billing	Arrears Billing	N
9	National Accounts	National Accounts	N
10	Dealer 001	Dealer 001	N

Include Inactive

Invoice Group Edit Inactive

Number:

Name:

Description:

Apply New Delete

Inactive

Code: Administrator Description: Administrator Level: 3 Credit Memo Limit: \$10,000,000.00

Access	Module
<input checked="" type="checkbox"/> Collection Status	SS
<input checked="" type="checkbox"/> Credit Reason	SS
<input checked="" type="checkbox"/> Customer Groups	SS
<input checked="" type="checkbox"/> Invoice Descriptions	SS
<input checked="" type="checkbox"/> Invoice Items	SS
<input checked="" type="checkbox"/> Payment Methods	SS
<input checked="" type="checkbox"/> Invoice Groups	SS
<input checked="" type="checkbox"/> RMR Reason	SS
<input checked="" type="checkbox"/> System Type	SS
<input checked="" type="checkbox"/> Taxing Group	SS
<input checked="" type="checkbox"/> Tax Table	SS
<input checked="" type="checkbox"/> Edit Item Tax Exemption	SS
<input checked="" type="checkbox"/> Currency	SS

Print Apply New Delete

Application Corrections

Accounts Receivable

Orphaned Payments

Issue: Orphaned Transactions were getting stuck in a stale status where users could not void from the front end and resubmit.

Solution: Resolved the portion of the Forte transaction process that was throwing the transactions into an orphaned state.

\$0 Unapplied Cash Transactions Never Settle

Issue: Users are able to submit unapplied cash transactions for zero dollars and submit them to Forte. Forte will approve the transactions, but will not settle them.

Solution: When creating unapplied transactions, prevent users from completing the creation of the transaction if the amount is zero dollars.

Accounts Payable

Purchase Orders in Service Tickets Missing Address Line

Issue: When creating a purchase order from a service ticket, the purchase order does not include the full warehouse address when being printed.

Solution: Ensure the full warehouse address is included on printed purchase orders that have been created from service tickets.

Cannot Edit Bills

Issue: If adding a bill with a costing type of job, but not attaching the bill to a job number, the bill still went through the locking process as if it was attached to a closed Job.

Solution: Check that the bill is actually attached to a job before it checks if WIP has been applied to lock the bill.

Service Ticket Vendor Returns

Issue: When a vendor return is created from a service ticket, the issued quantity of the part being returned is increased instead of being removed due to the return.

Solution: Changed the backend to count this action as returning the item, thus decreasing the issued amount of that part instead of increasing it.

Manitou Integration

SedonaOffice Accounts Pushed from Manitou

Issue: When creating an account in Manitou, then pushing that into SedonaOffice, the Manitou Info button does not successfully trigger.

Solution: We need for users to be able to access the Manitou info area when the account is pushed into SedonaOffice from Manitou the same way they would if the account was pushed from SedonaOffice to Manitou.

SedonaWeb

SedonaWeb Not Allowing Non-US Zip Codes

Issue: When customers try to register a new account on SedonaWeb, and they do not have a standard US zip code, the system errors and does not allow the registration.

Solution: Ensure that when registering a customer user that is utilizing a zip code that is not a standard US code, the registration does not error and allows the registration.