



SedonaOffice®

**Release Notice for
Version 6.1.0.60**

Rev 02

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About This Document

This document provides information related to software corrections for SedonaOffice version 6.1.0.60.

Special Upgrade / Install Instructions

If upgrading from a SedonaOffice version prior to 6.0, 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

Version Support

****SedonaCloud Users**** - If your company utilizes SedonaCloud in any manner (utilize Sales Automation, Time & Attendance, eForms, SedonaWeb 2.0, or the SedonaCloud API for integrations such as the Manitou integration), you will need to update your SedonaCloud to version 1.30.0.1 or higher when you update SedonaOffice to 6.1.0.60.

Minimum System Requirements:

Server is on Microsoft .Net 4.6.1

Features and Enhancements

Alternate Descriptions for Invoice Items and Parts

This feature allows Invoice Items and Parts to have Alternate Descriptions. These could be more user-friendly descriptions compared to the Part Vendor description OR they can be alternate languages to support multi-lingual regions. Additionally, these fields have been added in SedonaOffice and can be brought over to SalesAutomation through SedonaCloud. Finally, these fields have been made available in eForms so that customer-facing documents can take advantage of them.

Note: SedonaOffice customers must update to version 6.1.60 to take advantage of this new feature.

Technical Information

Alternate Descriptions have been added to both AlarmBiller/SalesAutomation and the SedonaOffice/SalesAutomation products. This means alternate descriptions can be added to Invoice Items and Parts in two ways.

- Defined in SedonaOffice and Synchronized over into SalesAutomation
- Defined in AlarmBiller/SalesAutomation

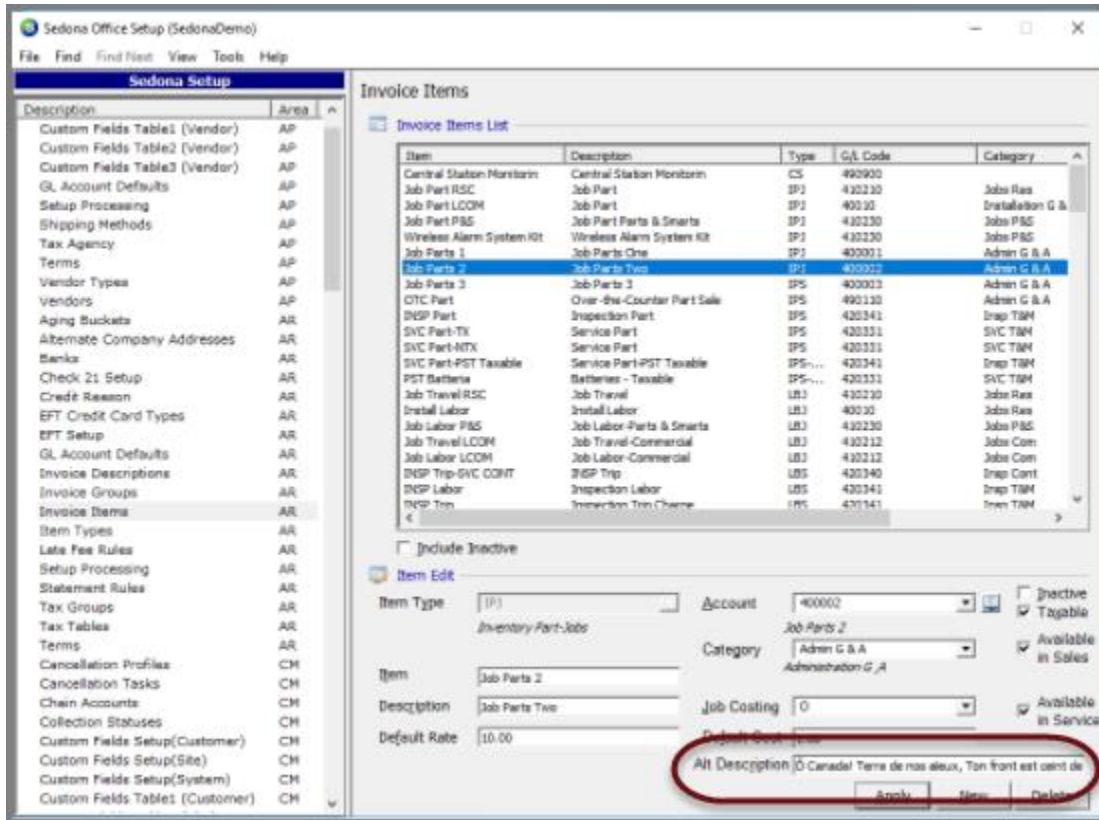
Invoice Items have one new field labeled Alt Description. This applies to both Recurring and Non-Recurring Items. Parts have three new fields called Alt Part Description, Alt Sales Description, and Alt Service Description.

Note: Alternate Descriptions for Invoice Items and Parts was designed to “Push” these descriptions into SalesAutomation for the purpose of including the text on Proposals. All Alternate Descriptions are not available for use in SedonaOffice on Job Part Lists, Tickets or any type of Invoice. The new fields added may be used when designing reports using third-party tools such as Excel, Access, SQL, etc.

Invoice Items Alternate Descriptions

An alternate description can be added in SedonaOffice for Invoice Items and Parts.

Below is the new Alt Description field for Invoice Items.



Part Alternate Descriptions

Below are the three new Alt Description fields for Parts.

The screenshot shows the 'Part Edit' window for part 5800PIR. The 'Alt. Description' field is highlighted in red in three different sections: Description, Sales, and Service. The 'Alt. Description' field contains the text 'Détecteur de mouvement sans fil'.

Section	Field	Value
Description	Description	Wireless Motion Detector
	Detail	Wireless Residential Motion Detector
	Product Line	Motion Detectors
	Manufacturer	Honeywell
	Manuf Part Code	5800PIR
	Manuf Warranty	One Year
	U.P.C	
	Notes	
	Alt. Description	Détecteur de mouvement sans fil
	Costing	Method
PPV Account		120900
Direct Exp Acct		N/A
AR Setup	Invoice Item	SVC Part-TX
	Income Acct	N/A
Sales	Invoice Description	Wireless Residential Motion Detector
	Price	175.1400
	Alt. Description	Détecteur de mouvement sans fil
Service	Invoice Description	Wireless Residential Motion Detector
	Price 1	159.2100
	Price 2	159.2100
	Alt. Description	Détecteur de mouvement sans fil

Application Corrections

Accounts Payable

Opening Receipt Record (Dev Case 18109) (Support Case 11756)

Issue: Opening receipts for vendors with a large amount of data is incredibly slow to load.

Solution: Implemented paging so all records do not have to load at one time for the following Vendor views: Bills, Credits, Applied Payments, Purchase Orders, Purchase Price Variances, Receipts, and Returns.

Vendor Edit Form is slow to load. (Dev Case 18313)

Issue: The Vendor edit form loads slowly with a large amount of data.

Solution: Apply list view paging of information in tabs on the Vendor edit form.

Accounts Receivable

Payment Processing-Cannot Re-open Payment Batch (Dev Case 18119)

Issue: Once you double click to get inside a specific payment batch, you cannot double click to open again after you have closed the payment batch to view details. You cannot re-enter that same payment batch without closing and relaunching Sedona Office.

Solution: Unlocked the batch record for reopen when closing the batch.

Client Management

Delete Email Address Record (Dev Case 17483)

Issue: Unable to delete an email from a BillTo where the record is marked as Primary and record is not flagged for emailed invoices.

Solution: When the email invoice option is not checked, you are now able to delete an email address and save the record. If email invoice option is checked, you must enter an email address to save the record.

Master Account Lookup on Customer Setup Form (Dev Case 17785)

Issue: The "Master Account" drop down list: if the "Master Account" gets focus (tabbed into or clicked in) without making a selection (the "Master Account" drop down list won't release focus unless a selection of some kind is made) and the user changes tabs then the crash will occur when the user opens the "Customer Setup" window again, uses a drop down list then tries to edit another field (does not matter what kind) after using a drop down list the crash will occur.

Solution: Changed so user can click off the Master Account without making a selection, change tabs, open Customer Setup window, use a drop down list and edit another field without receiving an error 91.

Inventory

Returning Serialized Part to Stock (Dev Case 17648)

Issue: Returning serialized parts to stock through inventory issues/returns to a different warehouse than it was originally issued, causes duplicate serial number entries in inventory.

Solution: Updated Serial Part warehouse so it does not create a duplicate entry. Return Serial Part option should not be visible in the Parts Explorer if it is issued against Job or Ticket.

Job Management

Job Queue Running Slowly (Dev Case 17514)

Issue: When viewing the Job Queue and selecting jobs with a status of Closed, jobs load very slow when there are a large numbers of closed jobs on file (over 30 seconds).

Solution: Fixed the form load to eliminate querying and populating the list twice. Added paging to speed up populating the list. Fixed sorting of calculated columns. Optimized some of the job queries.

To speed up the loading and refreshing of data displayed in the Job List (Job Queue), four new buttons have been added to facilitate advancing to the next page, previous page, first page or last page of data.

Note: You can no longer scroll through the list of jobs using the scroll wheel of your mouse or by using the page up or page down keys on your keyboard. You must use the new buttons at the bottom of the listing.

The screenshot shows the 'Open Job List' application window. At the top, there are several dropdown menus for filtering: '<All Job Statuses>', '<All Job Types>', '<All Companies>', '<All Installers>', '<All Project Mgrs>', and '<All Tasks>'. Below these is a 'Select Job Number' field with the value '2353' and a 'Total Jobs in Process: 424' indicator. The main area is a table with columns: Job #, Description, Customer #, Site Name, Address, City, Created, Start Date, Type, Task, Status, Units, and Open Install. The table contains 20 rows of job data. At the bottom of the table, there are four navigation buttons: '<< First', '< Previous', 'Next >', and 'Last >>'. A red arrow points to the 'Next >' button. Below the navigation buttons is a '0 PO's Received Since' field with the date '6/4/2021'. On the right side, there are two summary values: 'Total Open Install \$189,547.35' and 'Total Open RMR \$2,709.10'. At the bottom right, there are three buttons: 'Open', 'New', and 'Cancel'.

Job #	Description	Customer #	Site Name	Address	City	Created	Start Date	Type	Task	Status	Units	Open Install
1697	Access - Large Co...	12341	International Bar Code	160 Oak Street	Detroit	9/28/2017		ACC-Com	Order Parts	Parts	5	0.00
1698	Access - Residential	10001	We're Associates	12 Karen Cr	Chagrin Falls	9/28/2017		ACC-Res	Sch Install	Scheduling	0	0.00
1700	Access - Large Co...	47853	JF Teahouse	455 Penniman	Plymouth	9/28/2017		ACC-Com	Order Parts	Parts	0	0.00
1701	Access - Residential	4991	Dss	139 North Main Str...	Plymouth	10/3/2017		ACC-Res	Order Parts	Parts	0	0.00
1703	Access - Large Co...	10009	Hunter, Glenn (Guest ...	10365 Willow Road	Plymouth	10/4/2017		ACC-Com-Hol...	Sch Prewire	Scheduling	0	0.00
1704	Access - Residential	47931	Preston Kleened	48185 Joy Road	Canton	10/4/2017		ACC-Res	Sch Install	Scheduling	1	0.00
1705	Access - Residential	2016	Fiona Norton	134 Mohegan Drive	Novi	10/4/2017		ACC-Res	Jobcost	Jobcost	0	0.00
1706	CCTV - Residential/...	47932	Heidi Hoe	42521 Joy Road	Canton	10/5/2017		CCTV-Res	Jobcost	Jobcost	0	0.00
1709	Access - Large Co...	2000	T & J Autobody	16 Jencks Street	Canton	10/6/2017		ACC-Com	Sch Prewire	Scheduling	0	0.00
1710	Access - Residential	2003	Faith Hancock	43 Rene Court	Cleveland	10/6/2017		ACC-Res	Order Parts	Parts	0	0.00
246-B	Fire - Large Comme...	47934	Bright N Early, Ltd	1111 Mayfield Road	Canton	10/7/2017		Fire-Com	Order Parts	Parts	0	0.00
2000	Fire - Large Comme...	47935	Lox Stock & Bagel	8401 Chagrin Blvd	Barberton	10/7/2017		Fire-Com	Sch Install	Scheduling	1	0.00
240-C	Fire - Large Comme...	47936	Hook Lyne & Sinker	9124 Joy Road	Canton	10/7/2017		Fire-Com	Sch Install	Scheduling	0	0.00
48187	Add On/Upgrade - ...	47937	Opti Mystic	9789 Joy Road	Canton	10/7/2017		Add On/Upgra...	Jobcost	Jobcost	0	0.00
1713	CCTV - Large Com...	47940	Myles Inc.	7836 Garden Road	Huntington	10/15/2017		CCTV-Com-Co...	Prewire	Prewire	0	2975.00
1721	Access - Residential	396	Admiral Mark Lewis	45887 Starkweather	Canton	10/18/2017		ACC-Res	Jobcost	Jobcost	0	0.00
1722	Access - Residential	396	Lewis, Marie	8340 Forrest Drive	Canton	10/18/2017		ACC-Res	Jobcost	Jobcost	0	0.00
1730	Access - Large Co...	47853	Jamie's Java House	452 Penniman	Plymouth	10/23/2017		ACC-Com	Order Parts	Parts	0	1262.16
1732	Access - Large Co...	2006	Douglas Dyer	33 High St	Cleveland	10/24/2017		ACC-Com	Sch Prewire	Scheduling	0	0.00
1733	Access - Residential	2004	Crystal Conway	10 Rivergate Drive	Solon	10/24/2017		ACC-Res	Order Parts	Parts	0	0.00
1734	Access - Large Co...	2016	Fiona Norton	134 Mohegan Drive	Novi	10/24/2017		ACC-Com - In...	Order Parts	Parts	0	0.00
1736	Access - Large Co...	47853	Jamie's Java House	452 Penniman	Plymouth	10/26/2017		ACC-Com - In...	Sch Prewire	Scheduling	0	0.00
1738	Access - Residential	47853	Jamie's Java House	452 Penniman	Plymouth	10/26/2017		ACC-Res Part...	Order Parts	Parts	0	0.00
1742	Fire - Large Comme...	47951	Bickers & Bickers Atto...	8401 Chagrin Blvd	Chagrin Falls	10/27/2017		Fire-Com % P...	Sch Install	Scheduling	0	0.00
1744	Add On/Upgrade - ...	47935	Lox Stock & Bagel	8401 Chagrin Blvd	Barberton	10/27/2017		Add On/Upgra...	Install	Install Equi...	0	0.00
1745	Parts & Smarts	17219	Hobby Tyme Distribut...	64C Oakland Avenue	Canton	10/27/2017		Parts&Smarts...	Jobcost	Jobcost	0	144.05
1746	Access - Large Co...	47783	British Hairways	7436 Ford Road	Canton	10/27/2017		ACC-Com-Hol...	Order Parts	Parts	0	0.00
1747	Parts & Smarts	11561	Teddys Limousine	18 Rowan Street	Lansing	10/27/2017		Parts&Smarts...	Jobcost	Jobcost	0	0.00
1751	Fire - Large Comme...	2019	Aetna	1000 Middle Street	Lansing	10/27/2017		Fire-Com	Sch Prewire	Scheduling	55	290.00
1753	CCTV - Large Com...	47954	Wags To Riches	48185 Joy Road	Canton	10/27/2017		CCTV-Com-Co...	Prewire	Prewire	0	0.00

SedonaSchedule

Saving Job Appointments set for No Dispatching (Dev Case 17537)

Issue: When saving an appointment where Install company is defined 'No Dispatching' [in the Install Company setup], the user receives a message with the title: Current Date and Schedule Date Don't Match. Both dates are the same.

Solution: Added Date value function while comparing dates.

Report Manager

Labor Hours Report (Dev Case 18205)

Issue: When running the Labor Hours report the rate always shows as the regular rate instead of updating to show the correct overtime rate when needed.

Solution: Created a new function to retrieve the correct rate.