SedonaOffice Release Notes

October 2024

Version 6.2.0.18

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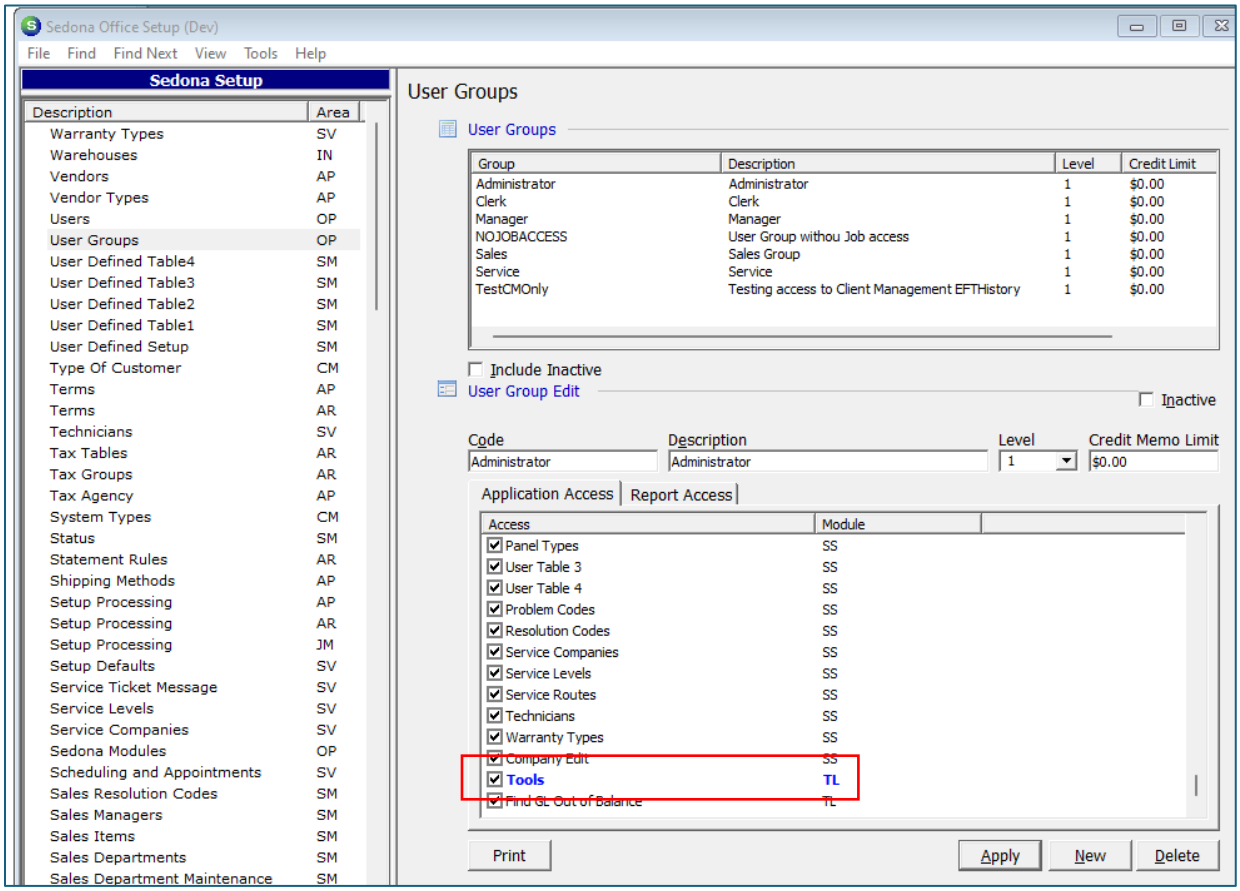
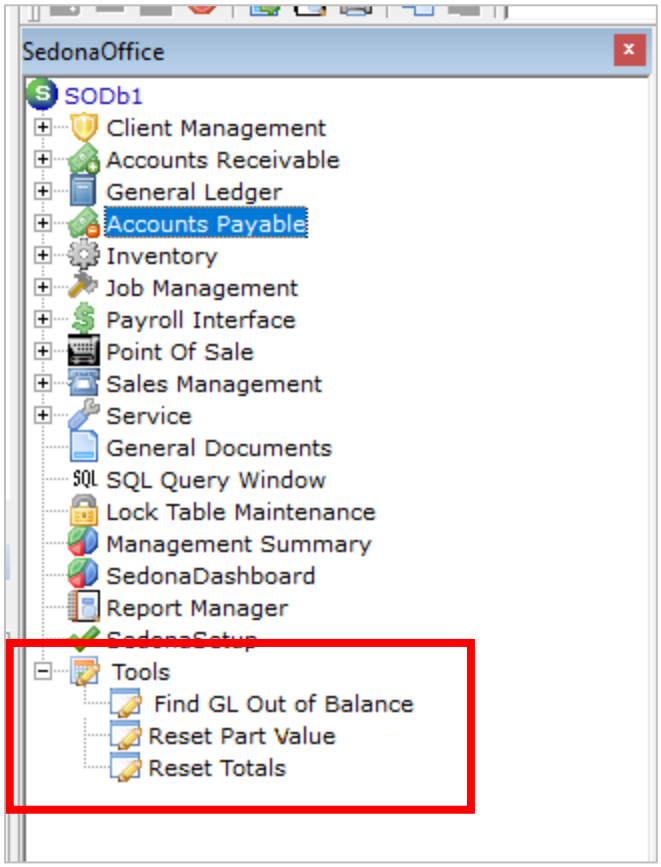
Enhancements/Features

New Utilities/Tools

We added three new utilities that can be added to a new Tools menu. To access the new Tools menu, go to the User Group setup, under the **Application Access** tab, select the **Tools** checkbox:



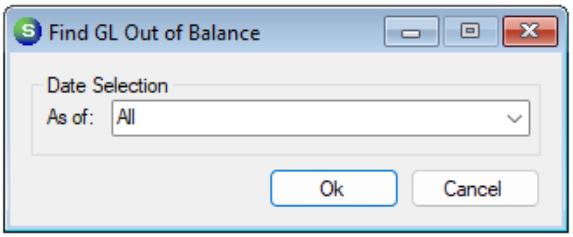
To find the new utilities, open the **Tools** option in the menu (under Setup):



Find GL Out-of-Balance Audit Utility [81324]

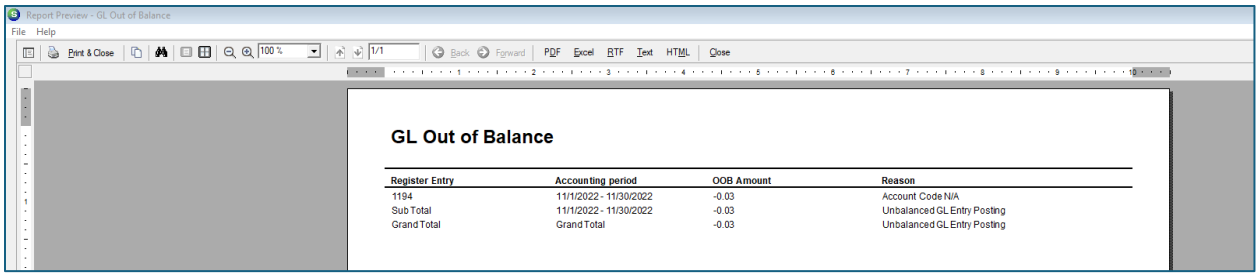
If your General Ledger reporting debits and credits are out of balance, and the Reset Totals utility has not corrected the problem, run this utility to identify the transactions causing the imbalance. Once you have the transaction list you can look up the items associated with the entries and re-save or delete them to correct the imbalance. The exact fix will depend on what entries are out of balance and why. If the entries cannot be re-saved or deleted, contact SedonaOffice Support for assistance.

Running the utility opens this form:



In the **As of** field, select an accounting period for the report. If you select All, the utility will show all records for all dates.

Click **OK**. A report opens showing any GL entries that are out of balance:



Reset Part Values Utility

If the on-hand value for an inventory part seems incorrect, run this Reset Part Values Utility to see if it corrects the issue.

Sometimes the on-hand value in the part header becomes out of sync with the actual part journal. When this happens, this utility can be run to force the header to recalculate based on the existing part journal entries. No entries are changed, the header is simply brought into sync with the journal.

Reset Totals Utility

This utility runs the Reset_totals stored procedure.

To prevent a decrease in processing speeds, SedonaOffice copies the general ledger tables, and all reports run against the copies. If the copies become out of sync with your actual general ledger, this stored procedure will correct that by refreshing the report tables. If there is ever a discrepancy in reporting, we recommend running this stored procedure first. If the discrepancy was caused by the report tables being out of sync with the general ledger this stored procedure will correct the issue.

Added Ability to Add the Time Zone Offset when Creating New Customer Site

We added the ability to add the customer's time zone offset from UTC in the time zone field when editing the address on the Site Setup tab while creating a new customer. Previously you could only add the time zone offset on the Site Setup tab when editing an existing customer.

Increased the Timeout when Adding to the Deposit Register [114129, 111838]

In some cases, saving a deposit would fail due to a timeout to the SQL server database. This would cause the G/L to be out of balance because the deposit total was written before the offsetting individual entries, which did not get completed.

To handle this, we increased the timeout when adding deposits to the register. We also improved the error handling for the deposit register. If there is an error while making a deposit, the entire transaction will properly rollback. Users will get a specific error and remain on the screen instead of exiting the client.

Vendor Concurrent User Activity Request [00111606]

We have enhanced the functionality around editing vendor records to allow multiple users, who have access to edit vendors based on their roles, to edit records for the same vendor at the same time. This is to help dealers increase productivity and efficiency so that they can service important vendors, ensuring their accounts are reconciled and paid in a timely fashion. This enhancement will allow, for example, one user to edit or pay bills while a second user edits a purchase order.

SedonaOffice does prevent users from editing the same element as the same time. For example, if one user is editing a vendor record such as address, phone number, or a specific bill, credit, purchase order, payment, etc. a second user cannot edit the same record. The second user will receive a message stating the record is locked. The second user can wait for the record to unlock or leave the record and return later.

These are the elements that cannot be edited at the same time by different users:

- Edit bills
- Pay bills
- Edit credits
- Edit POs (purchase orders)
- Edit receipts
- Edit returns
- Edit parts
- Bill using purchase order number
- Bill using receipt number
- Delete vendor

Only Active Employees Now Shown in Service Coordinator Dropdown [99368]

We updated the **Service Ticket Service Coordinator** field to only show active employees when users click the dropdown to select a service coordinator. If the service ticket currently contains an inactive employee as the service coordinator, that employee will display in the field and will display in the dropdown, but no other inactive employees will be displayed. This allows users to open the Service Ticket and select a new active employee to update the **Service Coordinator** field if there is currently an inactive employee as the service coordinator.

Application Corrections

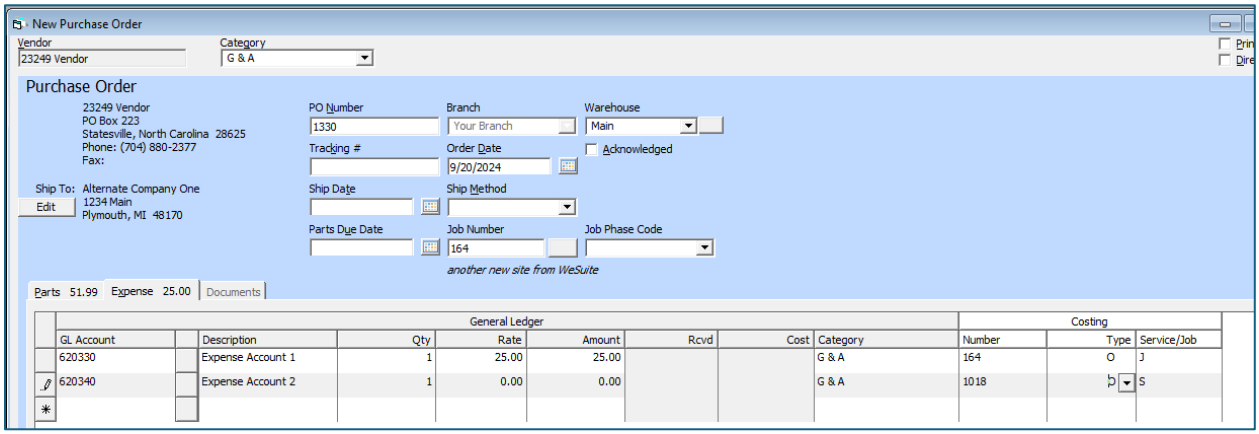
Accounts Payable

Removing Job/Service Ticket from PO header leaves the job costing on expense lines [00004336]

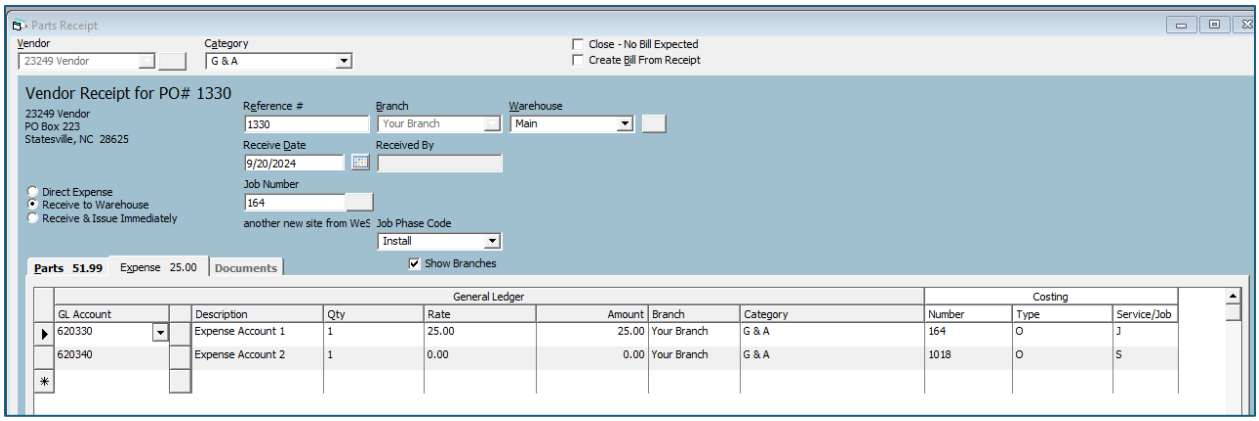
The issue was that the function controlling whether to show the Job column in the expense grid would only check to see if a job was specified on the record. When a job was changed from the purchase order, the expense items were checked to see if a message should be given if the Expense Item had a different job listed on them. This did not work properly and only would work if the second line item had a different job. When a job was removed from the purchase order and the expense items had a job, there was no warning.

Changing or removing the Job or Service Ticket number on the purchase order while there is an expense line item now shows a warning message on all line items. Because users can select a Service Ticket from the line item, we changed the look of the expense grid to make it clear if the line item was a Service Ticket or Job. We added a column for Service/Job which indicates which one is being used in costing. The Job was renamed to number to indicate that this is the Job/Ticket number and Job costing was changed to just Costing. We also changed the grids for the Parts Receipt and Bill as the purchase order was received and billed.

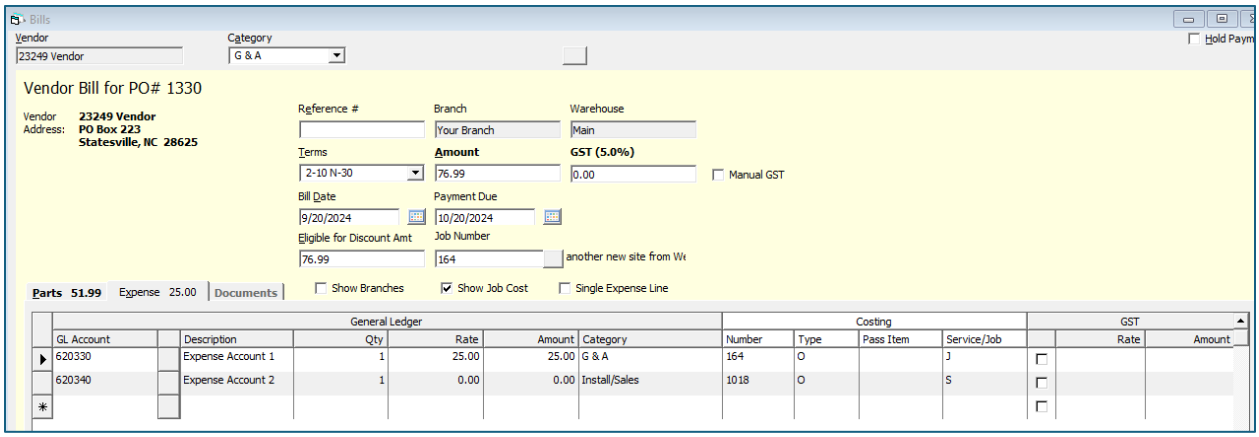
The New Purchase Order grid looks like this:



The Parts Receipt grid looks like this:



The Bills grid looks like this:



New PO - Open Jobs window formatting issue [00072321]

On the Open Jobs popup window, the options at the bottom of the window were cut off. We adjusted the size of the window to show the options.

Multiple Users allowed to create Bill for same receipt at same time [80304]

When a user was working in a vendor account, such as receiving a PO or entering a bill, another user was able to access the same vendor account and receive the same PO or enter the same vendor bill. We resolved this by preventing a user from editing the same record that another user is currently editing. For example, if one user is editing a vendor record such as address, phone number, or a specific bill, credit, purchase order, payment, etc. a second user cannot edit the same record.

Missing check boxes in Open Jobs box [62485]

We added two missing checkboxes for the Job Search form when searching jobs from line items inside a purchase order. This emulates the behavior of searching for jobs from the **Job Number** button.

We adjusted the positioning of the objects on the form so that the checkboxes are not cut off anymore.

Accounts Receivable

Job Numbers should not be allowed to be added to miscellaneous invoices [78140]

SedonaOffice prevents users from adding a job number to miscellaneous invoices when creating or editing the invoice.

Site Information on Invoices [116337]

We added a new column to Cycle Bill invoices called **Site Name** in the grid. When users edit Cycle Bill invoices, the Site Name is visible in the grid.

Client Management

Add Registration Code To OSG Export Scheme [00114861]

We added the customer registration code to the XML export for the OSG Export.

Service

Inspection duplicates [00115775, 17163]

Inspections on customer accounts were being duplicated. These duplicate inspection records were being created in the SV_Inspection table. We are now preventing this from happening. We also added a script

that runs automatically when updating to SedonaOffice v6.2.0.18. This script creates a new table called SV_Inspection_Duplicates and moves any duplicate inspection records from the SV_Inspection table to the SV_Inspection_Duplicates table so customers can review the duplicates and decide how to handle them. If the system tries to create duplicate inspections, users will see an error message.

Parts Updater

Parts updater Issue: Userdef Text1 only pulls 25 characters [20366]

We increased the User Defined Text1 limit to match the database field limit of 50 characters.

Parts updater Barcode button returns error: "File Not Found" [97090]

We resolved an issue where the connection string did not contain the proper information when calling the PartUpdaterBarcode.exe.

Note: You must have the PartUpdaterBarcode.exe in the same directory where the PartsUpdater.exe is located and run the PartsUpdater.exe as Administrator.

Parts updater: UPC not updating [97088]

We fixed an issue where the UPC Codes would not update even though they were present in the CSV file.

Note: The Parts Updater requires a separate installation, it is not included in the SedonaOffice Update. Please contact support if you need assistance with installing the latest Parts Updater.

Stored Procedures

New Stored Procedures

- LockTable_DEL
- LockTable_Lock
- LockTable_Release
- LockTable_Check_Entity

Updated Stored Procedures

- Reset_Totals

Database Tables

New Database Tables

- GL_Reset_Totals_Log
- SV_Inspection_Duplicates

Updated Database Tables

- AR_ACH_Update_Log
- SS_LockTable

Special Upgrade/Installation Instructions

If upgrading from a SedonaOffice version prior to 6.0, the following related updates are also required:

Legacy SedonaWeb 1.0 — Be aware that if your company uses Legacy SedonaWeb 1.0 (version 2.7.80 or earlier) with SedonaOffice version 6.2.0.8 or earlier, we recommend that you transition to using SedonaWeb 2.0. (Note: Legacy SedonaWeb 1.0 version 2.7.81 is compatible with SedonaOffice 6.2.0.9 or later.)

SedonaWeb/SedonaAPI 2.0 Setup — If your company uses the SedonaWeb/SedonaAPI 2.0 in any manner (Sales Automation, Time & Attendance, eForms, or the SedonaAPI for integrations such as the Manitou integration), IT will update your SedonaWeb/SedonaAPI version at the same time as your SedonaOffice version. This is to ensure compatibility with the Sales Automation module.

Performing Update — Once you have reviewed all 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.

To Use TLS 1.2 — Consider the following:

- All computers running SedonaOffice client must be on Windows 10 with the October 20, 2020 build, version 17763.1554 or later; the server must be on Windows Server 2019 or later.
- TLS 1.2 must be the only TLS version enabled in the Registry. TLS 1.0 and TLS 1.1 must be disabled. Verify they are disabled, and TLS 1.2 is enabled.
- The SQL Server must be set to force encryption.

Supported Environments

Minimum System Requirements

- Server is on Microsoft .NET 4.6.1
- If used, SedonaWeb/SedonaAPI 2.0 version 1.48.0 (or higher)