SedonaOffice Release Notes

January 2025

Version 6.2.0.19

Contents

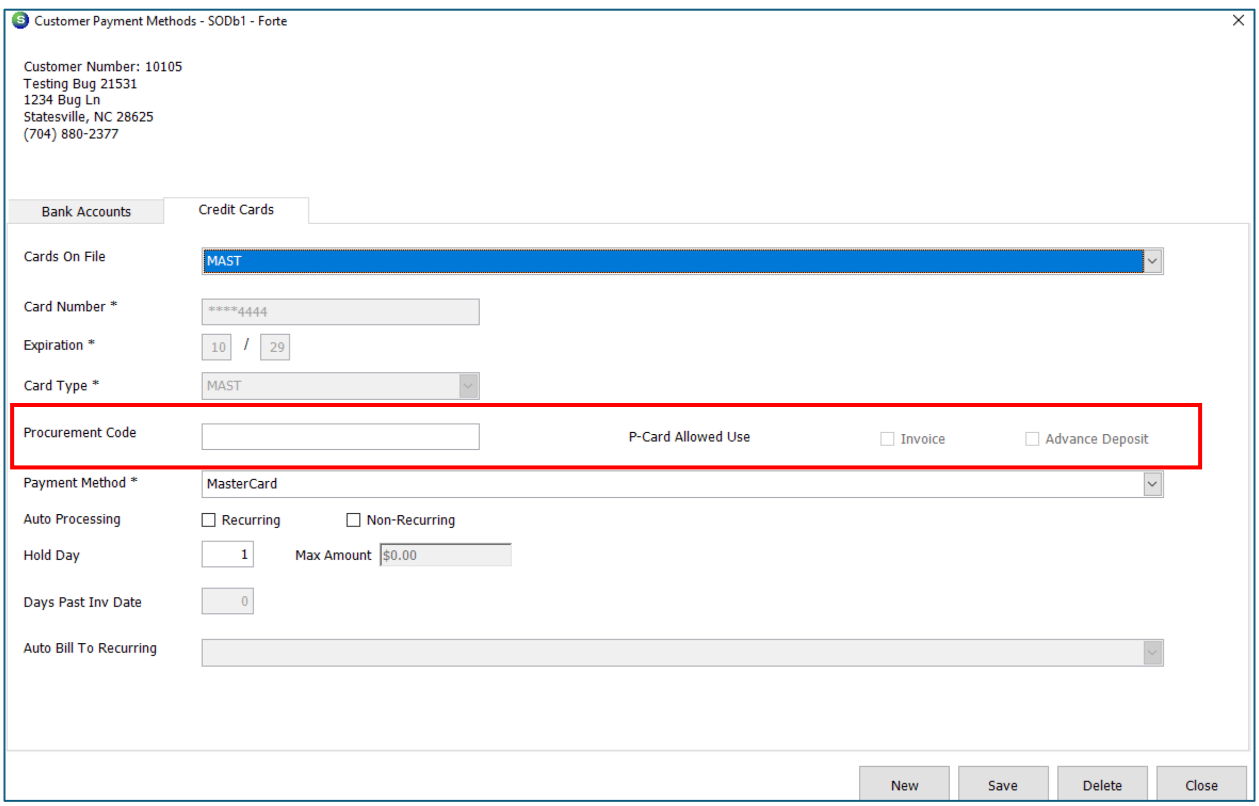
IMPORTANT NOTE for SedonaOffice version 6.2.0.19. There is a revision 2 update that includes several fixes. Be sure to install this update. In addition, you must update to the latest version of SedonaWeb/SedonaAPI 2.0 (version 1.49.0) due to credit card processing changes.

Enhancements/Features

Added Support for Level 2 Credit Cards Processing

We made changes to add level 2 credit card processing. These changes include adding the Procurement Code to credit card information and sending the invoice number, tax amount, and procurement code to the Forte transaction.

Users will see these changes on the Customer Payment Methods screen, Credit Cards tab:



Procurement Code: This allows 17 characters (letters and numbers)

P-Card Allowed **Use Invoice** checkbox and **Advance Deposit** checkbox.

When users enter payments, they will see if the selected card is a procurement card. They will also see when they selected a procurement card if it is allowed to be used for invoice payments or advanced deposit payments. If the procurement card is not allowed to be used, they cannot save or submit the payment.

Any messages in SedonaOffice for procurement cards use "allow" or "allowed" instead of "authorized" to avoid confusion with status messages related to Forte.

Enforcing Site Level, Required Custom Fields For New Customers [00112506]

When creating a new customer, the required fields for Sites in Custom Fields were not enforced. We added the Site Custom Field Tab to new customers so that the required fields are enforced.

Application Corrections

Accounts Payable

Write Checks Locked after upgrade to 6.2.0.18.18 [00125425, 125952]

We fixed an issue with the write checks function that would not allow other users to use the function after one user wrote a check.

Accounts Receivable

Journal entry for Advance Deposit missing job number [00095542]

The Journal Entry for Advance Deposit when using Unapplied Cash did not show the selected Job number. We fixed this by adding the Job Number to the Journal Entry.

Client Management

Clear Criteria Button Hangs up Search [00083726]

Doing a search and clicking the Clear Criteria button disabled the Add Criteria button and stopped the search from working. Users needed to close the search and reopen it to get it to work again.

We fixed this issue so that using the Clear Criteria button resets the search and allows the search to function as expected.

Default for new customer doesn't save [00121465]

When saving a new customer and not clicking the site, the site would default to commercial even if the default was residential. We fixed this by saving what was used on the first tab.

Type 13 Mismatch on Payment Options [00124604, 124526, 124450, 124517,124727,125579, 124863, 124999,125390,125747,125893, 126436]

We resolved an issue found when users clicked on Payment Options on the Customer Record. There was a type-13 mismatch error, and the customer payment methods would not load.

Job Management

When entering Job numbers, it takes a long time to populate the information [00116888]

To improve the time for populating job information, we temporarily disabled the job list display while the list is filtering.

Job Queue - Unscheduled Jobs - Run-time error [00121680]

We fixed an error that occurred if Customer Group Security was enabled and in the job queue users clicked the unscheduled jobs to review them.

General Ledger

Column issues in new tools reports [00122006]

We removed the Reason codes for Sub Totals and Grand Totals as these did not add value and were confusing.

Tool for finding GL out of balance not working [00125577, 123974]

When running the tool, the resulting report is blank. The tool will not return results if there are NULL values in the Amount columns for the GL_Register table. We modified the tool to replace NULL values with zeros. We also improved the response time for the tool, so it runs faster. Finally, we removed the Reason codes for Sub Totals and Grand Totals.

Report Manager

User password should not be stored in ReportParam.txt file [00080670]

When running a report that populated the ReportParam.txt file, the user's username and password appeared in the text file. We corrected this issue.

Service

Cannot see Signature Line in SO that was saved in Sedona-X [00059452,111615]

We fixed an issue where users could not see any signatures on Service tickets>Billing in SedonaOffice when their customers signed the terms and agreements in Sedona -X Service tickets.

Setup

User Front End has stopped working - EFT Customer [00125059]

When users selected EFT Customer, there was a “User Front End has Stopped working” error and “Visual Studio Just-in-time debugger” error that forced SedonaOffice to close.

Stored Procedures

New Stored Procedures

None for this release

Updated Stored Procedures

- ACH_Cycle
- Auto_CC
- Auto_CC_Store
- Customer_CC_Add
- Customer_CC_GetAll
- Customer_CC_Refresh
- Customer_CC_Upd
- Customer_CCs_Get
- FSU_CreditCard_Add (where calling web_Customer_CC_Add)
- FSUV3_CreditCard_Add (where calling web_Customer_CC_Add)
- GetAutoNonRecurCC
- SEFT_Get_ACHTransactions
- SEFT_Get_ACHTransactionsByTraceNumber
- SEFT_Get_ACHTransactionsByID
- SEFT_Get_Customer_CC
- web_Customer_CC_Upd
- web_Customer_CC_Add
- web_Customer_CC_Refresh

Database Tables

New Database Tables

None for this release

Updated Database Tables

- AR_Customer_CC
- AR_ACH

Special Upgrade/Installation Instructions

If you are using Sales Automation, refer to the AlarmBiller v4.51.0 product release notes for Sales Automation changes.

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 that they are disabled and that 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 1.49.0 (or higher)