



SedonaOffice[®]

Release Notice

Version 6.2.0.2

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About This Document

This document provides information related to software enhancements and application corrections for SedonaOffice after version 6.1.61.

Note: When SedonaOffice version 6.2 was originally released on September 22, 2021, a problem was found with the integration with SedonaOffice and Stages. Corrections have been made to the presented issue. Please see page 8 for additional information

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 6.2.

Minimum System Requirements:

Server is on Microsoft .Net 4.6.1

Features

New Upgrade Procedure from 5.7 to 6.2

The new upgrade procedure requires the following steps.

1. Upgrade SedonaOffice to version 6.2.
2. Run PCIComplianceUpdate to tokenize the credit cards. (This needs to be done with the legacy Forte credentials.)
3. Request RestAPI credentials from Forte and enter them into EFT Setup.
4. Run PCIComplianceUpdate again to tokenize the banks.

New Integration between SedonaOffice and Stages

We have added the ability to create and link Customer, Site, and Systems from SedonaOffice into Stages. This can be done from several places:

- New Customer wizard
- Existing Customer site
- Existing Customer System

We also can create and push the contacts and configurations (zones) on the Stages side.

In addition, we have the ability to read data back the above data as well as account history. We also include the ability to put individual systems on-test or the entire account.

*****Note:** Added a fix to ensure that the Monitored By field in SedonaOffice can still be utilized as expected and does not cause errors when navigating through the application.

Enhancements

Accounts Receivable - Updated Forte Settlement Process

The Forte settlement process has been modified to use Forte funding data to process settlements. The purpose of these modifications is to facilitate reconciling SedonaOffice EFT payment batches with Forte funding entries.

Currently the EFT payment batches do not match the Forte funding entries, because the EFT payment batches are created when transactions are approved, whereas the Forte funding entries are based upon when the transactions are funded. Since they will not contain the same transactions, it is difficult for SedonaOffice users to reconcile them.

This new process creates EFT payment batches that contain the same transactions as the Forte funding entries.

Settlement Process Flow

Current Operation

Currently, when a transaction is submitted, if a payment batch does not already exist for the day, a payment batch is automatically created by the software. This payment batch will contain all transactions that are submitted on the day in which it was created. Each submitted and approved transaction is added to the AR_Deposit_Check table and the payment record is linked to the appropriate batch in the AR_Deposit_Batch table.

New Operation

Because the payment check entry is created at the time that the transaction is submitted and approved, the transactions that are in the payment batch will not match those transactions that are in the Forte funding entries. Therefore, it is necessary to create a payment batch that matches the Forte funding entries. To accomplish this, the settlement process has been changed so that, as transactions are funded by Forte, the associated payment check will be moved from the “approved” batch into a new “funded” payment batch.

Technical Information

This section is directed towards employees familiar with the back-end of the database and provides information the transactional flow behind the scenes.

Get Forte Fundings

When the settlement process starts each night, the Forte funding entries are retrieved (using the Forte RestAPI endpoint “organizations/org_{{organizationID}}/fundings/”). This will provide a collection of funding entries that are in the process of being funded by Forte.

Create Forte Funding Batch

As each funding entry is processed, an AR_Deposit_Batch table entry is created, if it does not already exist. The funding batch is given the Description “<Merchant_Id>_<Funding_Id>”, where the Funding_Id is the funding Id of the Forte funding entry.

Add Funding Information to AR_Deposit_Batch

New columns have been added to the AR_ACH_Batch table to contain the Funding Id, Funding Status and Effective Date, and these will be populated with the corresponding data from the Forte funding entry.

Get Forte Settlements

The manner in which settlements are retrieved from Forte has been changed. Rather than retrieving the settled transactions using the “settlements” endpoint as was done previously, now as each funding entry is processed, a collection of associated settled transactions is retrieved from Forte using the “organizations/org_{{organizationID}}/fundings/fnd_{{fundingID}}/settlements” endpoint.

These settled transactions are processed as before, but after each has been processed, the corresponding payment entry (which was created when the transaction was approved by Forte) will be unlinked from the original approved payment batch and linked to the funded payment batch.

When an approved payment batch no longer has any payments linked to it, the batch will be removed from the database, since it has been replaced by one or more funded batches.

SedonaOffice User Interface Changes

The actual reconciliation of SedonaOffice payment batches with Forte deposits will be done using the existing Payment Processing feature of SedonaOffice. When the Payment Processing Batches list is opened, a list is displayed of all un-deposited payment batches. This list includes the automatically created EFT payment batches as well as any manually created batches.

The EFT payment batches will include the two types that were mentioned in the previous section: approved batches, which are those that were created when transactions were submitted and approved; and funded batches, which are those that were created when transactions were funded through Forte. To distinguish between the two, additional columns have been added to the payment batches list. These columns will include Funding Id, Funding Status, and Funding Date, and will contain values only if the batch is a funded batch.

Ready	Date	Description	Qty	Tape Total	Entered Total	Balance	Deposit Date	Check 21	Created By	Created On	Funding Id	Funding Status	Funding Date
<input type="checkbox"/>	8/23/2021	103799_FNDACH-0820-A1FOA	2	0.05	0.05	0.00	**Undeposited**	N	SedonaEFTSer...	8/23/2021 9:49:10 AM	AICH-0820-A1FOA	completed	8/23/2021
<input type="checkbox"/>	8/18/2021	103799_ACH20212458	2	0.05	0.05	0.00	**Undeposited**	N	Administrator	8/18/2021 1:31:15 PM			
<input type="checkbox"/>	7/28/2021	103799_FNDACH-0727-F7BDE	2	-0.12	-0.12	0.00	**Undeposited**	N	SedonaEFTSer...	7/28/2021 8:47:06 AM	AICH-0727-F7BDE	completed	7/28/2021
<input type="checkbox"/>	5/27/2021	190283_FNDCC-0225-22222	2	169.60	169.60	0.00	**Undeposited**	N	SedonaEFTSer...	5/27/2021 10:48:53 AM	CC-0225-22222	completed	12/31/1969 7:...
<input type="checkbox"/>	5/27/2021	190283_FNDCC-0225-11111	2	574.52	574.52	0.00	**Undeposited**	N	SedonaEFTSer...	5/27/2021 9:11:32 AM	CC-0225-11111	pending	12/31/1969 7:...
<input type="checkbox"/>	5/26/2021	190283_FNDCC-0225-2F7BF	2	251.75	251.75	0.00	**Undeposited**	N	SedonaEFTSer...	5/26/2021 1:39:32 PM	CC-0225-2F7BF	not_applicable	12/31/1969 7:...
<input type="checkbox"/>	4/13/2021	R190283_CC20210413	1	-3.00	-3.00	0.00	**Undeposited**	N	Administrator	4/13/2021 9:02:10 AM			
<input type="checkbox"/>	1/14/2021	190283_CC20210114	8	2901.75	2901.75	0.00	**Undeposited**	N	Administrator	1/14/2021 5:00:02 PM			
<input type="checkbox"/>	8/19/2020	31413_CC20200819	2	25.00	25.00	0.00	**Undeposited**	N	Administrator	8/19/2020 7:59:55 AM			
<input type="checkbox"/>	8/18/2020	190283_CC20200818	1	3.00	3.00	0.00	**Undeposited**	N	Administrator	8/18/2020 8:37:54 AM			
<input type="checkbox"/>	8/17/2020	190283_CC20200817	0	60.00	60.00	0.00	**Undeposited**	N	Administrator	8/17/2020 9:26:03 AM			
<input type="checkbox"/>	6/2/2020	31413_CC20200602	8	325.00	325.00	0.00	**Undeposited**	N	Administrator	6/2/2020 7:00:33 AM			
<input type="checkbox"/>	5/29/2020	31413_CC20200529	4	93.00	93.00	0.00	**Undeposited**	N	SedonaPayme...	5/29/2020 6:38:58 AM			
<input type="checkbox"/>	5/28/2020	31413_CC20200528	1	50.00	50.00	0.00	**Undeposited**	N	Administrator	5/28/2020 8:51:36 AM			
<input type="checkbox"/>	5/28/2020	190283_CC20200528	2	966.61	966.61	0.00	**Undeposited**	N	Administrator	5/28/2020 1:51:14 PM			
<input type="checkbox"/>	5/27/2020	31413_CC20200527	1	75.00	75.00	0.00	**Undeposited**	N	Administrator	5/27/2020 6:55:36 AM			
<input type="checkbox"/>	4/2/2020	190283_CC20200402	1	25.00	25.00	0.00	**Undeposited**	N	Carolyn	4/2/2020 1:47:02 PM			
<input type="checkbox"/>	2/7/2020	190283_ACH20200207	58	10253.26	10253.26	0.00	**Undeposited**	N	SedonaPayme...	2/7/2020 10:50:03 AM			
<input type="checkbox"/>	2/7/2020	190283_AMER20200207	24	12629.18	12629.18	0.00	**Undeposited**	N	SedonaPayme...	2/7/2020 10:51:56 AM			
<input type="checkbox"/>	2/7/2020	228455_AMER20200207	3	504.00	504.00	0.00	**Undeposited**	N	SedonaPayme...	2/7/2020 10:53:54 AM			
<input type="checkbox"/>	2/7/2020	190283_CC20200207	111	81037.41	81037.41	0.00	**Undeposited**	N	SedonaPayme...	2/7/2020 10:51:50 AM			

Total Entered: 972,491.76

The payment batches displayed in this form can be deposited by selecting the desired batch, and clicking the Deposit button at the bottom of the form. However, EFT payment batches can only be selected for deposit if all transactions in the batch have been funded. Therefore, the approved batches can never be deposited, since the transactions contained within these batches will never be funded. This is because, as described in the previous section, the transactions in these batches will be moved to a funded batch and then deleted from the approved batch. The funded batches will be available for deposit only after all transactions have been fully funded, and this will be indicated by a Funding Status of "Complete".

Manitou Integration

Enhancement

We have updated the integration with Manitou to support creating and pushing Areas as well as Zones from SedonaOffice into Manitou on new account creation. It provides a tab to define Areas, and then on Zones, you can assign all the zones to an Area or to *. These will push over into Manitou.

Application Corrections

Accounts Payable

Vendor Payment Address Incorrect if Vendor Created from SedonaSetup (17667) [Internal]

Issue: Payment address is incorrect if a vendor record is created through SedonaSetup.

Solution: When creating a new vendor from SedonaSetup, set the payment address to the vendor address. If the payment address is not the same as the Vendor address, the user will need to make any changes by editing the vendor record in the main SedonaOffice application.

Entering a Bill from a Receipt - Error 3265 - Item cannot be found in the collection corresponding to the requested name or ordinal (20417) [22285]

Issue: When creating a bill from a receipt, SedonaOffice throws error 3265 - Item cannot be found in the collection corresponding to the requested name or ordinal.

Solution: After closing the receipt, the page that is displayed in the Vendor tree is switched from Purchase Orders to Receipts. The column sort function thought the POs were still being displayed, so it was selecting the wrong column. Fixed this by setting the view selection to the appropriate value.

Accounts Receivable

Negative payment batch cannot reverse 2 invoices on 1 check (17740) [9768]

Issue: Cannot apply one negative check to multiple invoices. The software tries to reverse the entire check amount from the first invoice when you move off the first invoice line.

Solution: Removed condition for changing the amount in the grid.

Payment Processing is confusing on the EFT Processing screen (19277) [18161]

Issue: When you open the EFT Processing menu, the screen shows the title as Payment Processing, which is confusing since there is a payment processing menu that opens a payment processing screen.

Solution: Changed the caption to EFT Processing instead of Payment Processing.

Emailed Invoices - Net Terms are not calculating correctly. (19283)[16154]

Issue: The terms due by functionality is not showing correctly on emailed invoice.

Solution: Corrected the due date while emailing invoice by using CalculateDueDate function. So that It show same due date while printing and emailing invoice.

Client Management

Cannot print the zone list from CS zone list (17494) [3663, 14962]

Issue: The System Zone list is blank when printed from the C/S Info button Zone list on a System record.

Solution: Changed the .RIF File so we can run the ZoneList.exe.

Customer Query Builder Error received upon trying to search last for of credit card (18977) [10994]

Issue: Receiving Incorrect Syntax error "ACH_Last_Four_Digits" in the Customer Query Builder when searching last four of credit card.

Solution: Corrected Initialize Tables_SD Is null function with correct syntax. Also added script in version_next.sql.

Inventory

Part Edit for Serialized part automatically reduces quantity and value to 0(17768) [12232]

Issue: The first time you click save on the part edit of a serialized part, the system makes an automatic adjustment to reduce the quantity and value of the serialized part to 0.

Solution: Removed serial number check to get the standard cost from inventory so that it does not reduce the value while updating the serial number.

Part Transfer Issue when receiving and adding a serial number to a transfer in mid-transfer (17770) [12230]

Issue: When you are in the middle of transferring inventory and you receive and add a serial number to the transfer, the receiving warehouse quantity is increased, but the serial number remains unissued in the original warehouse.

Solution: Resolved syncing issues from obtaining data from incorrect sub-items.

Inventory issues/returns – Allows Parts to be Returned for Tickets (17888) [12294]

Issue: You can return parts from tickets in inventory issues/returns even though you receive the message "Parts already issued to service must be removed directly from the service ticket!"

Solution: Disabled the Save button when clicking on return when parts are already issued to a service ticket.

Returning a serialized part through inventory issues/returns does not prevent returning it through job part issues (18086) [12226]

Issue: The part issues screen on a job allows you to return a serialized part even though it was already returned through the inventory issues/returns process.

Solution: Check whether a serialized part quantity has already been returned then display a message before saving indicating the serialized part was already returned. Restricted the user from returning the part more than once.

Job Management

Job Query builder produces incorrect results due to N/A in the Project Manager Field (17493) [4782]

Issue: Receiving incorrect results when building job queries. Change order shows the Project Manager as N/A N/A even though the job has an assigned project manager.

Solution: Updated Change order process to update the project manager and to allow changing the project manager in the change order. Also changed the stored procedure to update the project manager field in a change order to match that of the original job.

It is possible to zero out job returns for serialized parts (17512) [9656]

Issue: A serialized part is issued to a job, do a return to stock on that issue. Go back to the return transaction, and change the qty on it to 0. The part then shows it has been issued to the job however within the inventory journal, the serial number listing for the warehouse incorrectly shows the part is in stock.

Solution: Prevent user from changing the quantity to zero on job part returns for serialized parts.

Returning a serialized part through inventory issues/returns does not prevent returning it through job part issues (18086) [12226]

Issue: The part issues screen on a job allows you to return a serialized part even though it was already returned through the inventory issues/returns process.

Solution: Check whether a serialized part quantity has already been returned then display a message before saving indicating the serialized part was already returned. Restricted the user from returning the part more than once.

Job Queue can no longer print list of all jobs - have to print each page (20326) [22820]

Issue: Latest update shows multiple pages for Job Queue and I have to print a job list per page. Can no longer print the entire job list at once.

Solution: Created a new list view with all records before printing the list.

Service

Able to issue 1 serial number to a service ticket for a quantity greater than 1(17769) [12231]

Issue: It is possible to issue 1 serial number to a service ticket at a quantity that is greater than 1, which throws off inventory quantity, inventory value and the ticket quantity and value.

Solution: Disabled the Quantity Field for serialized parts to restrict the quantity to 1.

Report Manager

YTD Income Statement GL Wildcard returns all data (17528) [Internal]

Issue: If GL Wildcard is selected for the Year to Date Income Statement and one GL income account is defined in the report parameters, the report includes the detail of all income general ledger accounts not just the GL account selected.

Solution: Added a filter for GL Wildcard.

The Jobs over/under report is incorrect when exported. (18968)[12556]

Issue: The jobs over/under report is incorrect because it does not include the estimated sub contract labor when exported. The PDF version appears correctly.

Solution: Added custom fields in the query for the CSV export similar to the PDF.

SedonaSetup

Vendor Payment Address Incorrect if Vendor Created from SedonaSetup (17667) [Internal]

Issue: Payment address is incorrect if a vendor record is created through SedonaSetup.

Solution: When creating a new vendor from SedonaSetup, set the payment address to the vendor address. If the payment address is not the same as the Vendor address, the user will need to make any changes by editing the vendor record in the main SedonaOffice application.

Printing the Job Types from Sedona Setup (18828) [15418]

Issue: When printing the Job Types from Sedona Setup, users receive a blank list.

Solution: Created new report to print Job Types from Sedona Setup.

Job Query Builder available when removed in User Group permissions. (18964)[12369]

Issue: Removing all query permissions and all report access for a user group still allows users in the group access to the Job Query Builder.

Solution: Implemented code to check permission for Job Query Builder menu. Enabled menu only if permission allowed to user group.

Terms Setup sets the Days Due to 0 (19465) [10753]

Issue: When editing a Term in Setup the days net due are reset to 0.

Solution: Sync the days net due while updating the record.

Type mismatch 13 on Delete of Postal Code under United Kingdom. (20110)[21461]

Issue: Run-time error '13': Type mismatch message received when trying to delete an existing United Kingdom Postal Code.

Solution: Segregated Table3 Id from Tokened string using Parser class. In addition, made sure users cannot delete postal codes that are in use.

Manitou Integration

Generate Invoices Using - Fatal Error Message Received (20553) [22918]

Issue: Receive the following error when trying to generate invoices using Manitou integration, Fatal error: Router error (The Sedona integration library encountered a COM Error: IDispatch error #3079 (Error converting data type varchar to datetime)).

Solution: Added missing parameters to Invoice_Add stored procedure call in Auto_Invoice_Buffer. Added some additional columns to AR_Customer and AR_Customer_Bill inserts.

Manitou integration is locked to US Country Code (20804) [00024327]

Issue: The United States Country code is hard coded in the Manitou API, which is causing issues when countries outside of the U.S. want to push a customer from SedonaOffice into Manitou via the "Manitou Info" button.

Solution: Updated the API call so that it will retrieve the country assigned to the Integration User and use that country code when looking for matching dealers in the drop down within the "Manitou Info" button, which is used to push a customer from SedonaOffice into Manitou.

SedonaOffice Change Customer Number not Propagating to Manitou (21543)

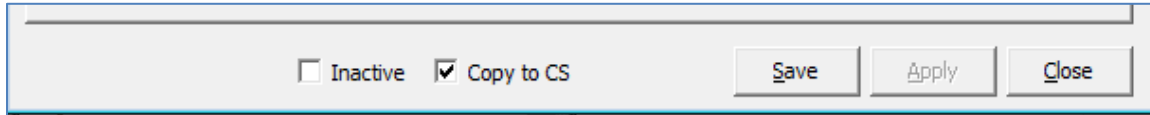
Issue: When changing the Customer Number in SedonaOffice, it was updating the A/R number in Manitou, which would cause the customer to lose its linking.

Solution: Corrected behavior so that the A/R will update as expected and linking is maintained.

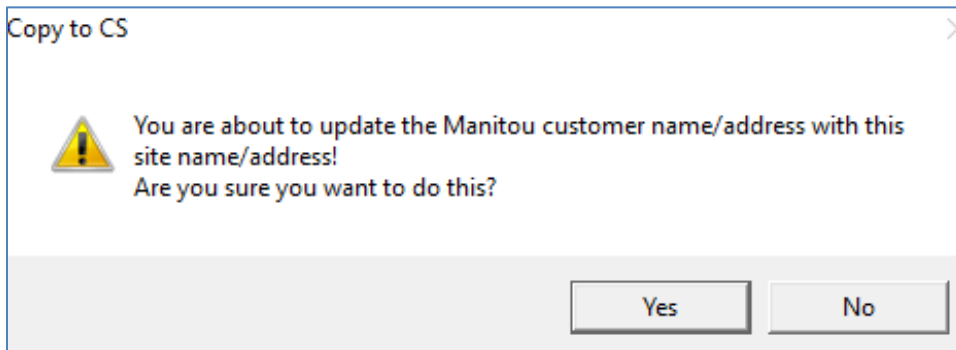
Added a 'Copy to CS' Checkbox when Editing a Customer Site in SedonaOffice (21542)

Issue: Added the ability to let the user select individually if the customer address changes should be updated in Manitou regardless of the option set in the database.

Solution: On the SS_Integration table, if the option for 'Copy_To_Manitou' is set to 'N' (false) when editing a site in SedonaOffice, there will be a checkbox at the bottom giving the user the option to force-push address changes to Manitou.



Prior to the changes being saved the user will get a warning message to verify the copy to Manitou.



If the option in SS_Integration for 'Copy_To_Manitou' is set to 'Y' (true) the same functionality will exist including the warning, however the 'Copy to CS' checkbox will be checked by default.

Technical Information

SedonaOffice Database Setup - SedonaDocuments script error (19521) [Internal]

Issue: During the SedonaOffice Database Setup process, the SedonaDocs script throws an error when the SedonaDocuments and SedonaMaster databases are not in the same SQL Server instance.

Solution: Added logic to check if SedonaMaster exists before trying to populate the SS_General_Folder table in the SedonaDocuments database with data from the Company table in SedonaMaster. If the SedonaMaster database is not found, then a Warning message is raised to indicate what needs to be done. "Warning: SedonaMaster database is not found on this instance of SQL Server and the SedonaDocuments database cannot be automatically populated with data from SedonaMaster.

The SedonaDocuments.dbo.SS_General_Folder table will need to be populated manually."

WS_Account_ADD2 is not created in SedonaOffice database (19775) [Internal]

Issue: The stored procedure WS_Account_ADD2 is not created in Sedona Office databases. This procedure is not in the MasterSetupStandard database and while the file is physically present in the SedonaOffice Database project folder it is not included/reference.

Solution: Included Missing store procedure WS_Account_ADD2.