SedonaOffice Release Notes

August 2026 (Updated October 2026)

Version 6.2.0.23, Rev 2, Rev 3, and Rev 4

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Version 6.2.0.23 Rev 4

FSU Issue: Technicians could no longer “depart” from jobs on FSU [00168206, 167845]

After the 6.2.0.23 upgrade, field technicians using FSU could no longer mark themselves as departed from a job. Departing from service tickets still worked, and so did departing from the SedonaOffice desktop client and the Sedona X mobile app.

The database code that saves job appointment updates was missing a required piece of information, so the “depart” action failed for jobs. The code was corrected for the field service job appointment update. An unneeded extra lookup was also turned off.

SEFT lock takeover defect [00170375]

SedonaOffice locks a record while someone is working on it, so two people cannot change it at the same time. Previously, when the electronic funds transfer (EFT) service took over a lock that had been abandoned, it could mistakenly apply that takeover to every lock in the system instead of just one. As a result, many unrelated records (vendors, purchase orders, jobs, customers, bills, invoices and service tickets) could show as locked by the EFT service for hours. Users saw messages like “locked by SedonaEFTService for 608 minutes.”

This fix makes the takeover affect only the single record it is meant for, so unrelated records keep their correct lock status. We also updated related lock handling and field service job appointment saving to work with this correction.

We made these changes to resolve this:

- Changed SS_LockTable schema so the following columns are no longer nullable and default to an empty string. This contributes to the efficiency of finding locks by table name, code, and lock user.
    - Table_Name
    - Code
    - LockedByUser
    - Owner_Table_Name
    - Owner_Code
- Stored procedure LockTable_Release was performing isnull(<column>, '') on several table columns, causing a table scan because the expected index could not be used. Isnull has been removed from the table columns as it is no longer needed because the columns can no longer be null.

- A query in stored procedure SEFT_LockTable_Acquire was inadvertently updating all SS_LockTable rows instead of only the one desired row. This has been corrected.

Job Sales Summary: Balance to Bill is understated when a job has credited invoices [00170358]

The Balance to Bill field on the Job Sales Summary was calculating and displaying an incorrect value when credits existed on the job.

We corrected the calculation for the Balance to Bill field on the Job Sales Summary so it shows the correct value when there are credits on the job. (This issue and fix do not apply to jobs in AIA style billing, because their credit is already counted in AIA style billing.)

Pasting a journal entry (over 3000 lines) into GL gives an error [00170643]

Pasting a large payroll journal entry (about 3,000 lines) into the General Ledger could fail with a "0" error and roll back the posting. The check that confirms the entry balances took so long that it timed out after about 30 seconds. In some cases, it could also report the entry's balance incorrectly.

The balance check now adds up each ledger line exactly once, so it finishes more quickly and gives the correct result.

Post .23 Version Update Issue - mismatched types on both the stored procedure side and statements that originate in the client [00170461]

After updating to version 6.2.0.23, some customers saw slower performance in areas that handle electronic payments, such as ACH transactions, refunds, and customer account lookups. SedonaOffice was sending the database some search values in a different format than the database stored them. Because of the mismatch, the database could not jump straight to the matching records. It had to read through a much larger set of records to find them, which slowed these operations down, especially on larger databases.

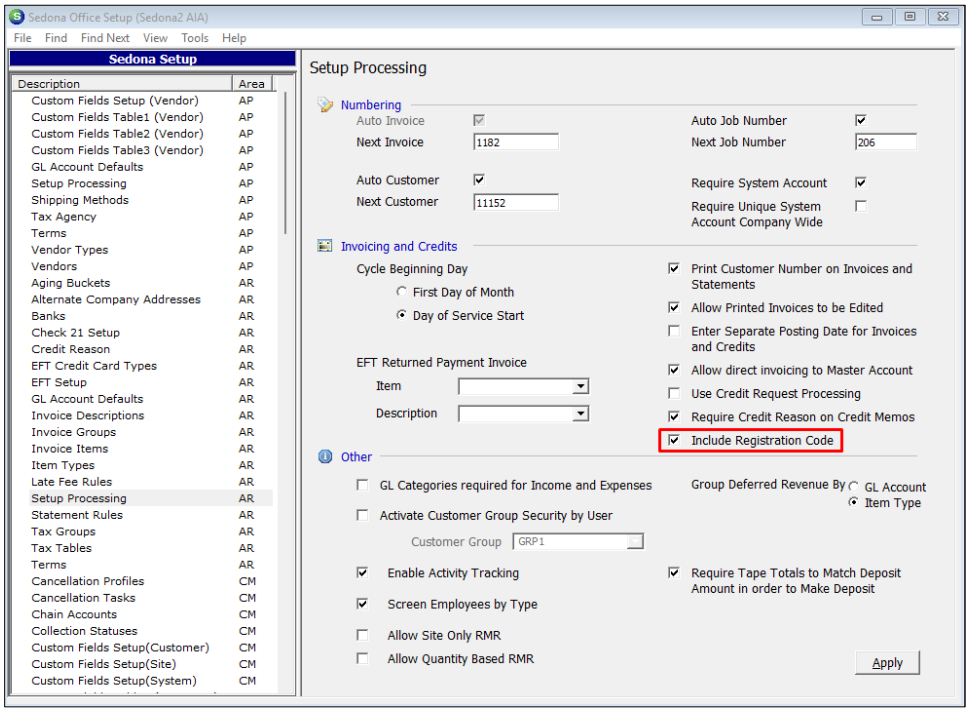
We updated the application and the database so both use the same format when searching for payment and customer records. The database can now go straight to the records it needs instead of scanning many. The change covers ACH transaction handling, settlement and reconciliation updates, refunds, and the customer information, credits, and invoices lookups.

Version 6.2.0.23 Rev 3

Request immediate removal of the registrationCode attribute from the billTo element [00166174]

The OSG export file was including the registration code when some users did not want this.

We corrected this issue, so the **Include Registration Code** checkbox (on SedonaSetup > Setup Processing) controls if the registration code is included in the OSG export file or not: select the checkbox to include it and clear the checkbox to exclude it. Note that the checkbox is selected by default. For users who do not want to include the registration code, they will need to clear the checkbox.



Version 6.2.0.23 Rev 2

Runtime Error: Could not find stored procedure 'Job_UPD' [00162453]

We fixed an issue that caused a runtime error, when users selected Enable AIA Style Billing or Prevailing Wage on the Work Order Entry of an existing job and clicked Apply.

Job locked message no longer shows the user who has the job locked [00149704, 00162603, 00162853]

The message that indicated a record was locked no longer showed the user who had the record locked.

We corrected this, so the message shows the username.

Create IN_ADI_ProductList was bugged in v6.2.0.22 for certain SQL Databases

When doing a v6.2.0.23 upgrade on a customer with an older database, the creation of the IN_ADI_ProductList table failed because of the reference to OPTIMIZE_FOR_SEQUENTIAL_KEY. Anything pre-2019 would not have this value available to set or use, but we use it in the upgrade script for re-creating the IN_ADI_ProductList.

We fixed this issue. If a site has the IN_ADI_ProductList table in the database, nothing happens; there are no errors during upgrade. If a site does not have the IN_ADI_ProductList table in the database, the table is created during upgrade.

Enhancements/Features

AIA Billing

Refer to the separate guide for AIA billing: *AIA Billing in SedonaOffice*.

Labor Grades Replace Prevailing Wage from Job Phase

There are several changes related to removing prevailing wages from job phases and using labor grades.

Database Changes

There are database changes:

1. New OE_Labor_Grade table with these fields:
   - Labor_Grade_Id
   - Description
   - Direct_Wage_Rate
   - Indirect_Wage_Rate
   - Inactive
   - **NOTE**: This is pre-populated with 'N/A' (inactive) and 'Unspecified' (active)
2. New OE_Job_Prevailing_Wage table with these fields:

- Job_Prevailing_Wage_Id
- Job_Id
- Labor_Grade_Id
- Prevailing_Wage_Rate

3. Existing OE_Job modifications table with a new field added:
   - Use_Prevailing_Wage
   - **NOTE**: This is set to 'Y' if an existing Prevailing_Wage is > 0, otherwise it is 'N'.

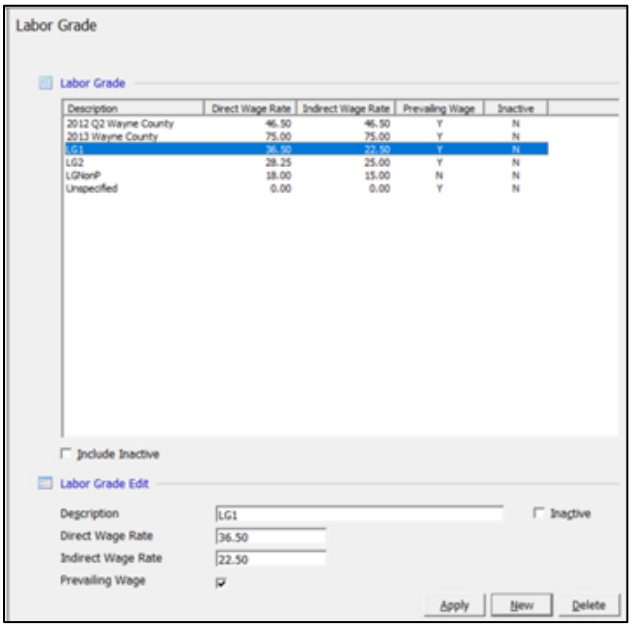
Stored Procedure

There is a new stored procedure called Job_Cost_Other. This retrieves 'other' costs grouped by expense description.

Screens/Forms

These are form/screen changes:

1. New Labor Grades form (SedonaSetup > Labor Grades):

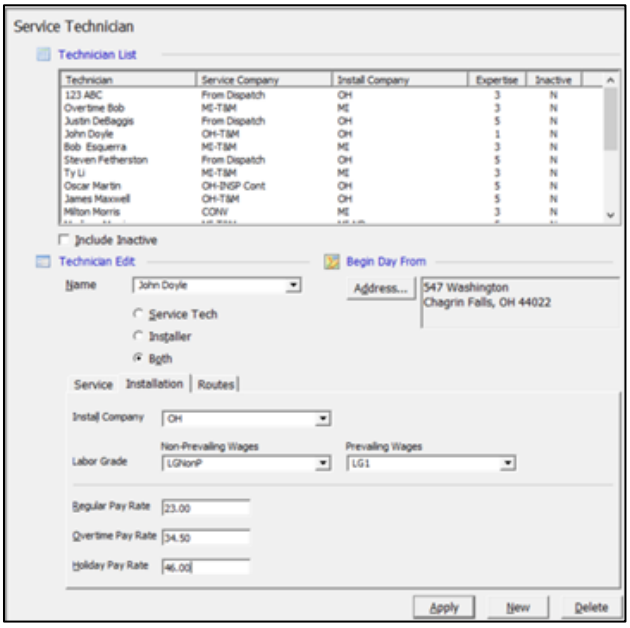


   - This is a standard setup form. All wage rate values must be greater than or equal to 0.
   - There is a **Prevailing Wage** checkbox on each labor grade.
     - If this checkbox is selected, the labor grade is included in the technician **Prevailing Wage Labor Grade** dropdown and job-specific prevailing wage rate form.

- If this checkbox is cleared, the labor grade is included in the technician **Non-Prevailing Wage Labor Grade** dropdown.

- During migration, an 'Unspecified' labor grade is created that holds all existing job prevailing wage rates. 'Unspecified' can be made inactive once users add real labor grades.

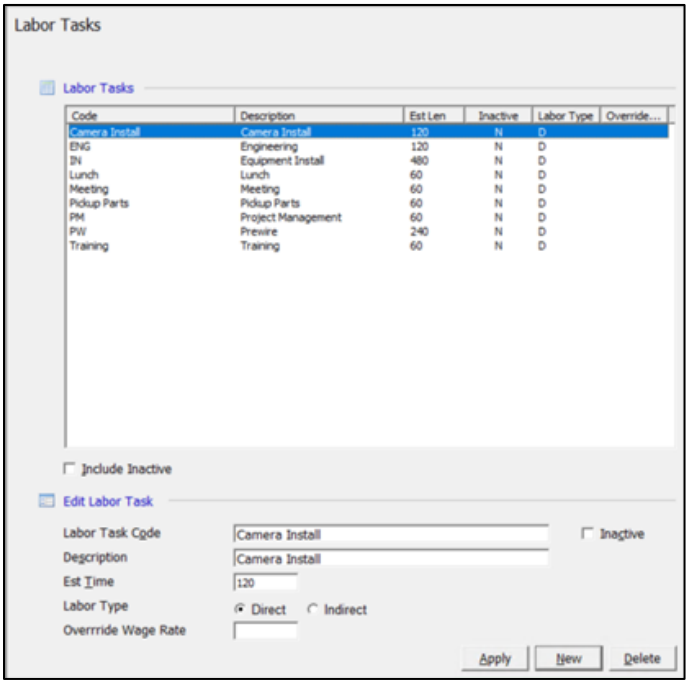
2. Prevailing Wage form:
   - We removed this form.
   - Existing prevailing wage records are migrated to corresponding labor grades:
     - Prevailing wage description becomes the labor grade description.
     - Prevailing wage rate becomes the labor grade direct wage rate.
     - Labor grade indirect wage rate is also set to prevailing wage rate (there is no direct/indirect distinction as existed before).
     - The labor grade prevailing wage checkbox defaults to selected.
   - Users can reassign technicians to appropriate labor grades.
   - Users can make old labor grades inactive or delete them if no longer needed.
3. Technician Edit form (SedonaSetup > Technicians):



   - On the Installation tab, there are two new labor grade dropdowns:
     - **Non-Prevailing Wage Labor Grade**: this used when a job is not marked as prevailing wage.
     - **Prevailing Wage Labor Grade**: this used when a job is marked as prevailing wage.
     - Which one is used depends on the job's prevailing wage checkbox status (selected or cleared).

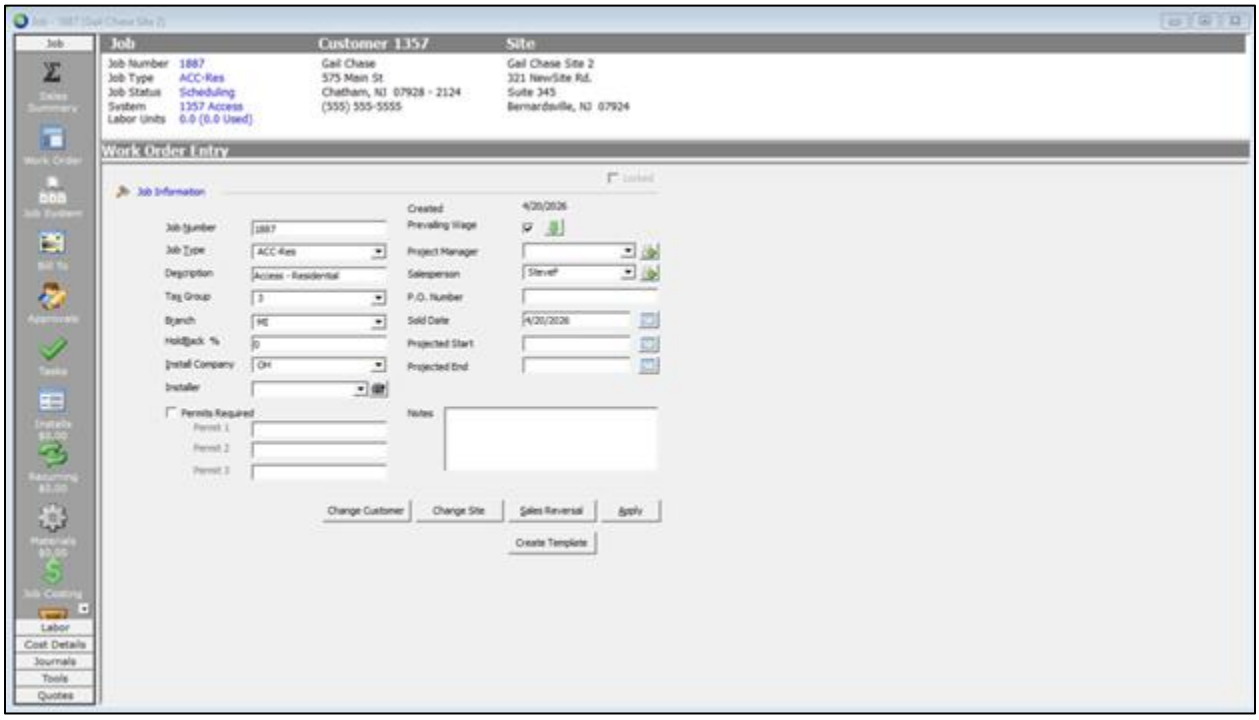
- Migration:
  - Prevailing wage labor grade is set to 'Unspecified' for all existing technicians:
    - Ensures that prevailing wage functionality continues on existing jobs.
    - A job's prevailing wage rate is stored under 'Unspecified' labor grade
    - Technicians must also have 'Unspecified' for clocked time to use a job's prevailing wage.
  - Non-prevailing wage labor grade: Set to 'N/A' for all existing technicians.
  - This preserves existing pay rates functionality.

4. Edit Labor Tasks form:



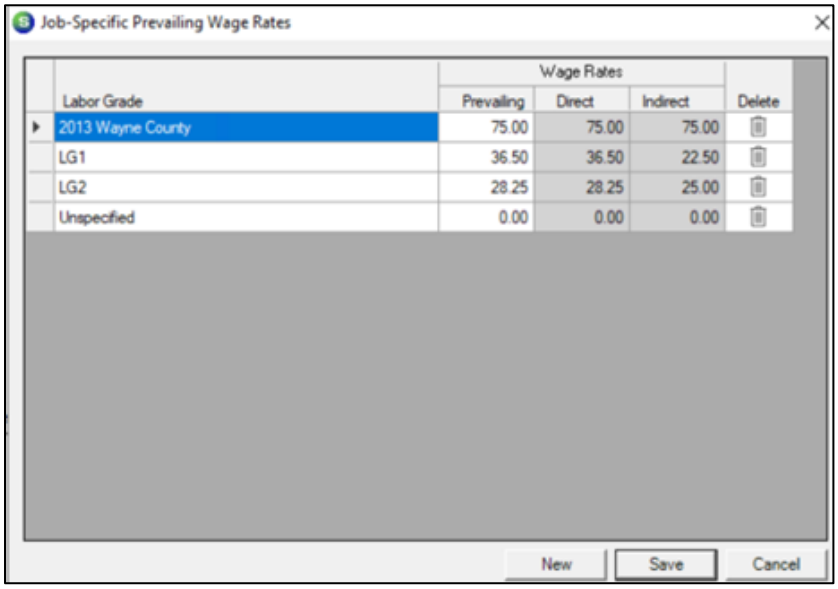
- New field: **Labor Type**: **Direct** or **Indirect**. Once time is clocked against a labor task, the labor type cannot be changed.
- New Field: **Override Wage Rate**: Empty or greater than or equal to 0.
  - If set (including 0.00), this overrides the technician's labor grade rates or pay rates.
- Migration: All existing labor tasks set to 'direct' type with empty override wage rate.

5. Job Work Order Entry form:



- **Prevailing Wage** field changed to a checkbox.
- Users can change this even after job is in progress.
- Uses whatever setting is in effect when technician time is recorded.

6. New Job-Specific Prevailing Wage Rates form:



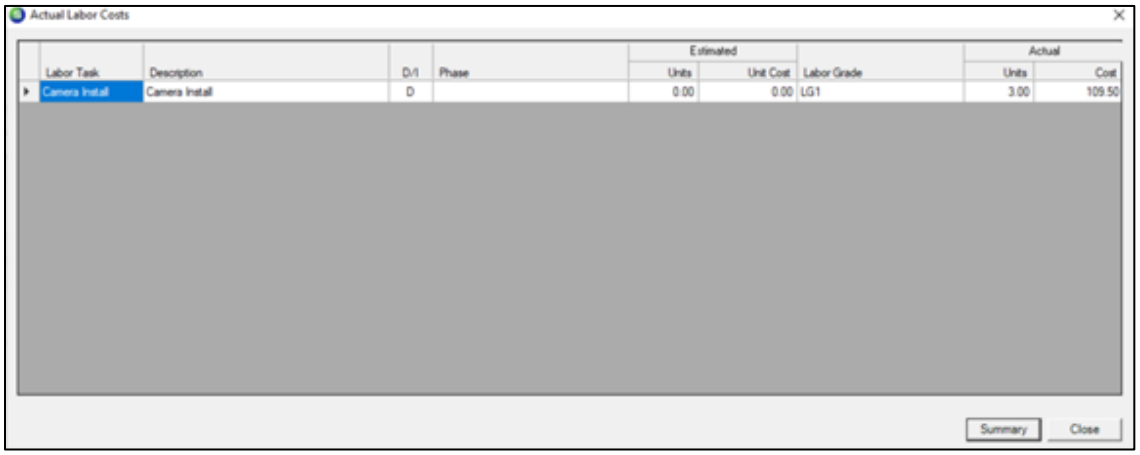
- Users access this using the button next to the **Prevailing Wage** checkbox on the Work Order Entry form.
- This shows current direct/indirect wage rates for reference (read-only).
- This also shows all active labor grades with prevailing wage rates defaulted to direct wage rates.
- Users can add rows for new labor grades added after initial setup.
- Users can delete rows for labor grades that are no longer needed.
- If a technician's prevailing wage labor grade lacks a prevailing wage rate on the job, the system uses the labor grade's direct wage rate.
- Migration: The existing prevailing wage rate is moved from the job header to 'Unspecified' labor grade.

7. Job Costing form:

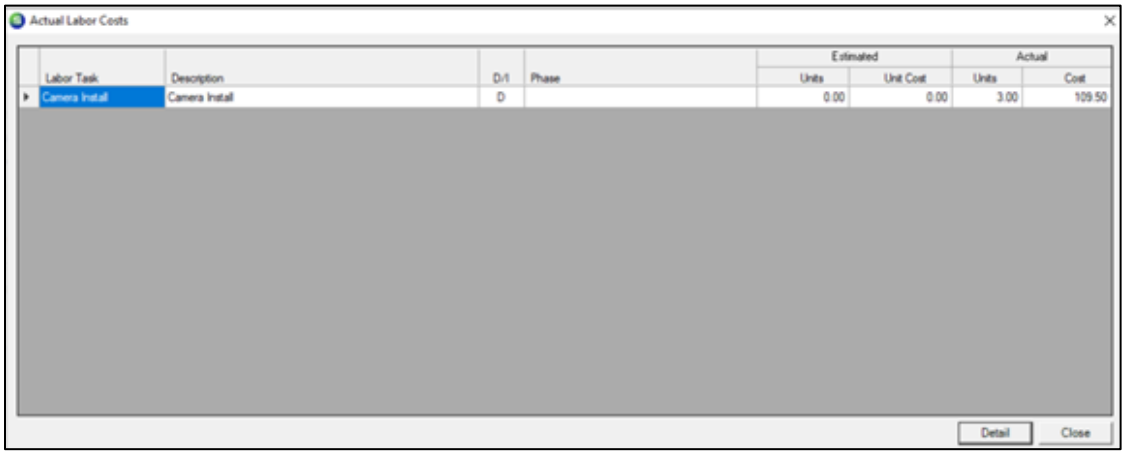


- The **Detail View** button shows the Job Labor Tasks in detail view. The labor grades shown depend on job's prevailing wage status:
  - Prevailing wage job: Shows the prevailing wage labor grades.
  - Non-prevailing wage job: Shows the non-prevailing wage labor grades.

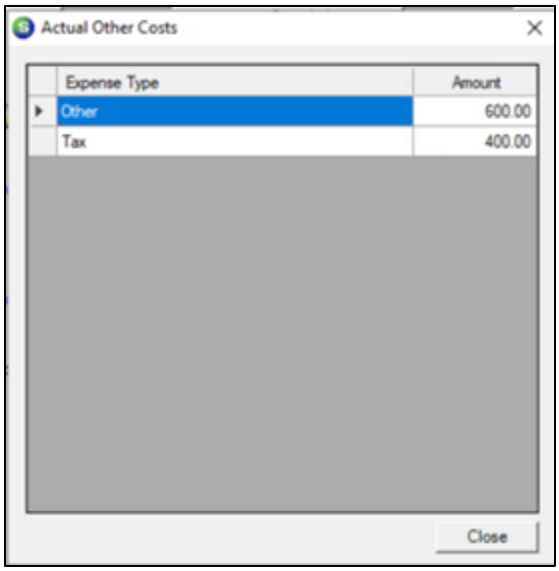
- This has a switch for Summary or Detail:
  - Detail view: Shows all labor grades for each task separately.



  - Summary view: Rolls up all labor grades into actual units/costs.



- A new button in the Actual column/Other row shows the breakdown of other costs by expense type.



8. Job - Time Sheet form:
   - This is the hierarchy for the Pay Rate:
     1) Does the labor task have an override wage rate?
        - Yes: Then use the override wage rate.
        - No: Go to step 2.
     2) Is the job marked as prevailing wage?
        - Yes: Go to step 3 (Prevailing Wage Path)
        - No: Go to step 6 (Non-Prevailing Wage Path)

     Prevailing Wage Path

     3) Does the technician have a prevailing wage labor grade?
        - Yes: Go to step 4.
        - No: Use the technicians regular pay rate.
     4) Is the labor task marked as 'direct'?
        - Yes: Go to step 5.
        - No: Use the technicians prevailing wage labor grade's indirect wage rate.
     5) Does the job have a prevailing wage assigned to the technician's labor grade?
        - Yes: Use the job's prevailing wage rate.
        - No: Use the technicians prevailing wage labor grade's direct wage rate.

Non-Prevailing Wage Path

6) Does the technician have a non-prevailing wage labor grade?
    - Yes: Go to step 7.
    - No: Use the technician's regular pay rate.
7) Is the labor task marked as 'direct'?
    - Yes: Use the technicians non-prevailing wage labor grade's direct wage rate.
    - No: Use the technicians non-prevailing wage labor grade's indirect wage rate.

- If a user manually changes a defaulted rate, there is a confirmation warning.

Migration

All changes preserve backward compatibility, existing jobs and timesheets function identically after the update as before.

Late Fees are Handled when Invoices are Paid from SedonaWeb 2.0

We updated the payment posting process to correctly identify and split late fee amounts when an invoice payment includes both the invoice balance and a late fee. When a late fee is paid in SedonaWeb 2.0, the invoice amount from that payment posts to the AR GL account; the late fee amount from that payment posts to the Late Fee Income GL account; and Undeposited Funds continues to be debited for the full payment amount. If for any reason a payment larger than the invoice balance and late fee is made, the extra amount goes to Unapplied Cash.

For example, for a $100 invoice with a $5 late fee and a $105 payment, $100 is applied to AR and $5 is posted to Late Fee Income instead of being posted to Unapplied Cash. For a $100 invoice with a $5 late fee and a $110 payment, $100 is applied to AR and $5 is posted to Late Fee Income and $5 is posted to Unapplied Cash

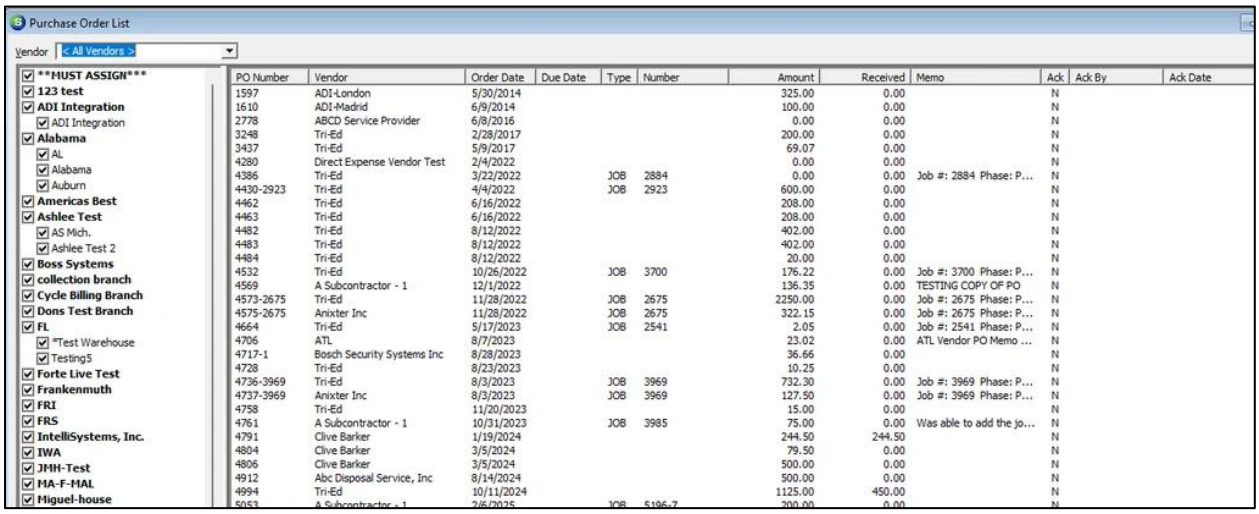
This change applies to regular customers and master customers and covers all payment types that flow through payment/deposit posting, including check, cash, and electronic payments.

View Capabilities for Read-Only Vendor Access Permission

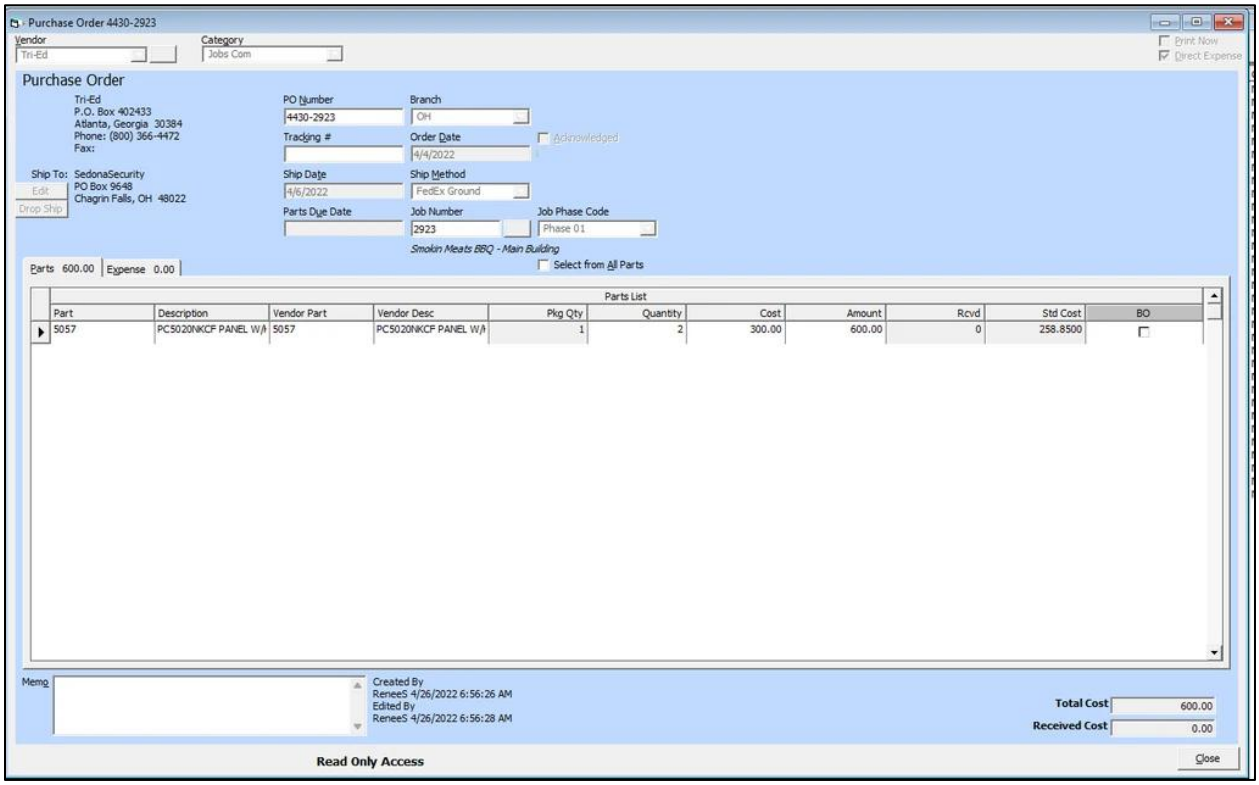
On User Group Security, if users have **Read Only Vendor Access** permission, they have two options under Accounts Payable: Purchase Orders and Vendors.



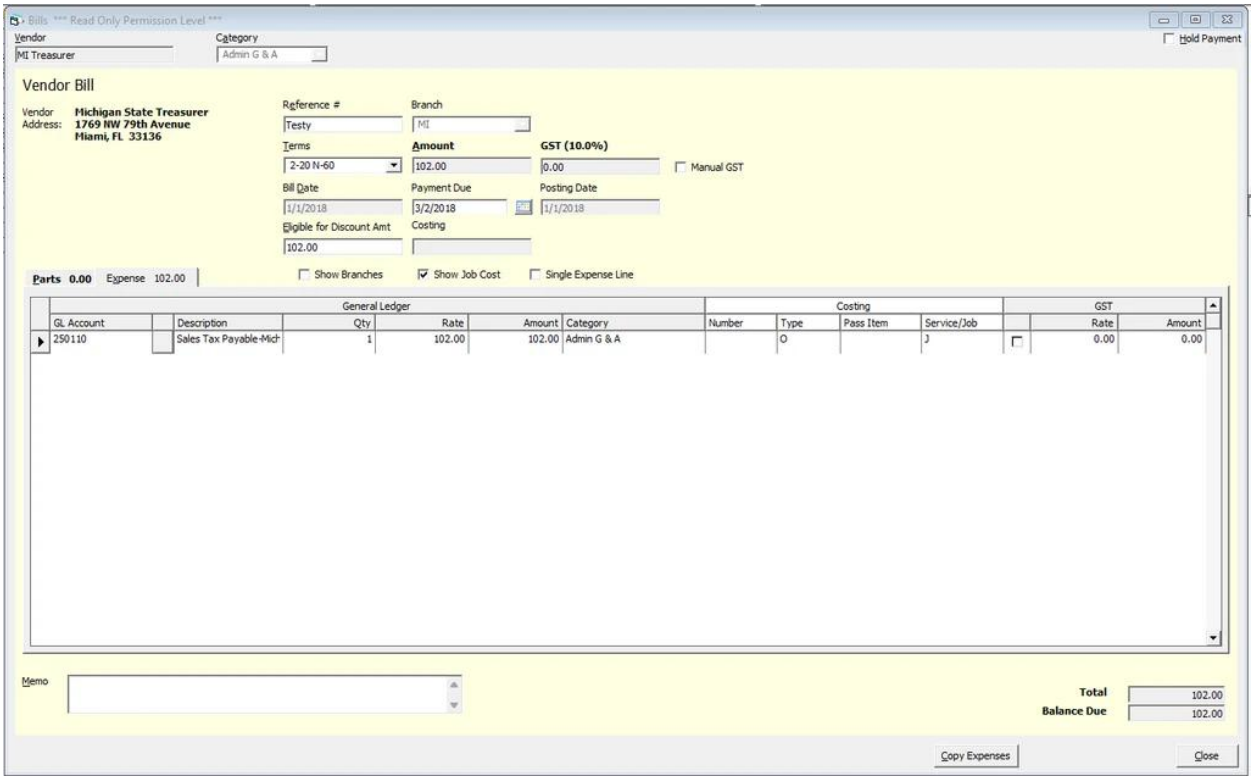
Choosing Purchase Orders shows the purchase order list:

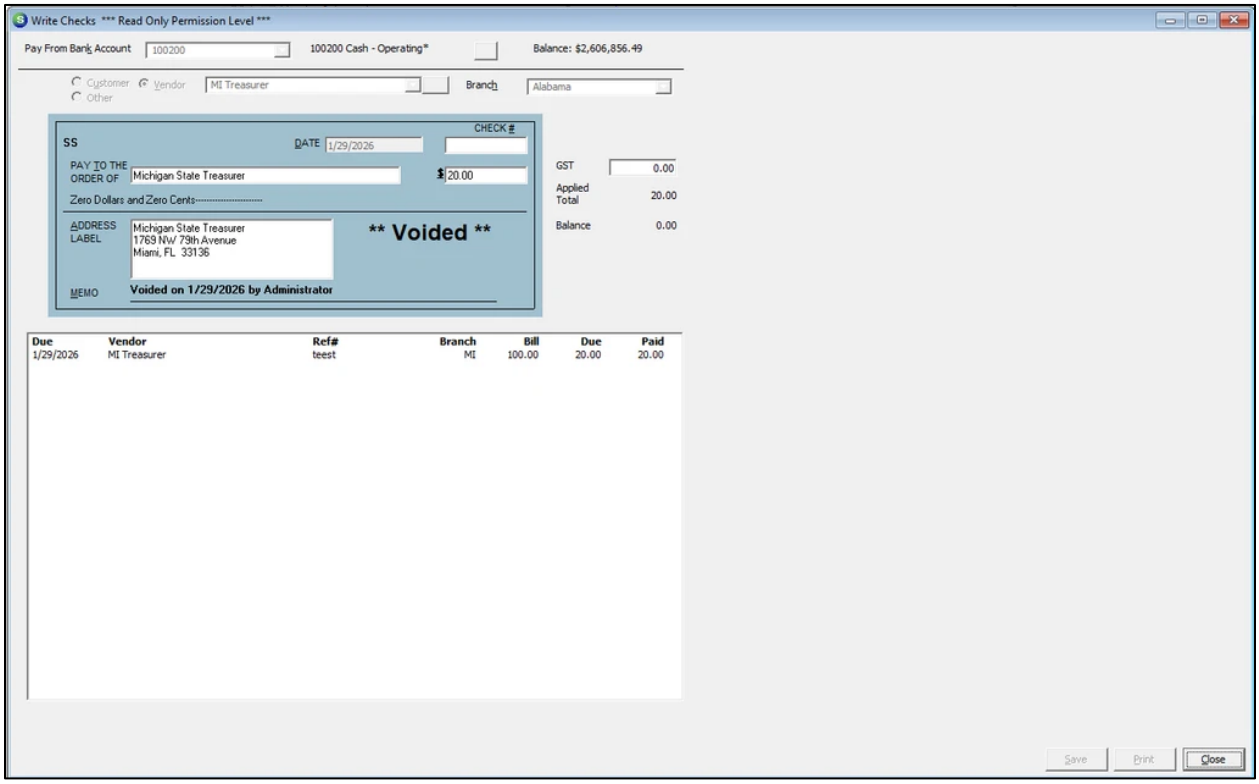


Clicking a purchase order in the list shows the purchase order in view only (or ready only) access:

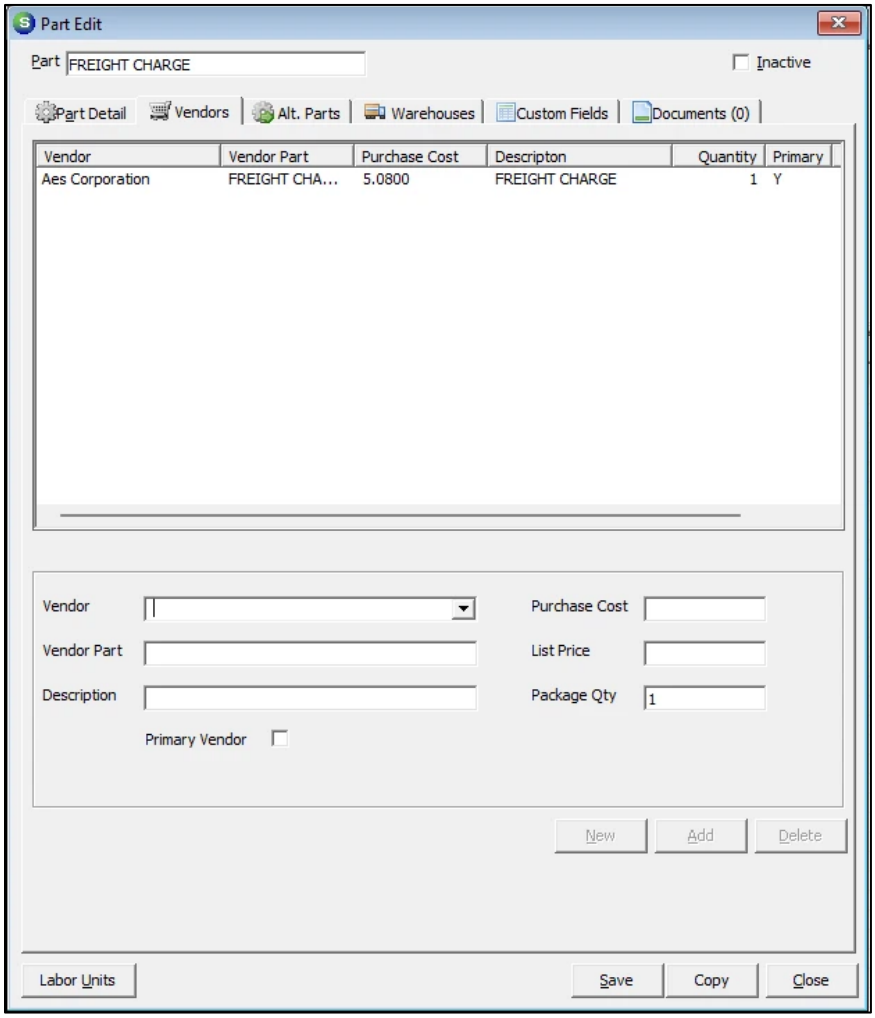


Choosing Vendors gives view only access to bills, payments, and purchase orders:




Write Checks *** Read Only Permission Level ***
Pay From Bank Account
100200
100200 Cash - Operating*
Balance: $2,606,856.49
Customer
Vendor
Other
MI Treasurer
Branch
Alabama
SS
DATE
1/29/2026
CHECK #
PAY TO THE ORDER OF
Michigan State Treasurer
$ 20.00
Zero Dollars and Zero Cents----------
ADDRESS LABEL
Michigan State Treasurer
1769 NW 79th Avenue
Miami, FL 33136
** Voided **
MEMO
Voided on 1/29/2026 by Administrator
GST
0.00
Applied Total
20.00
Balance
0.00
Due
Vendor
Ref#
Branch
Bill
Due
Paid
1/29/2026
MI Treasurer
teest
MI
100.00
20.00
20.00
Save
Print
Close

If users have only **Read Only Vendor Access**, when they view the Part Edit form, the form will not have the New, Add, or Delete buttons enabled:



Users cannot access the Edit Parts screen if they do not have the Parts Edit permission.

GL Register Entries Report: Added the Category Column

On the GL Register Entries report, we added the Category column. If users export the report to Excel, they can use the category dimension to build departmental P&L statements, trailing income statements, and cash flow analyses outside SedonaOffice.

Application Corrections

Accounts Payable

Vender showing open credit when paid by credit card [00153630, 149850, 149962, 149981, 150613]

A vendor was incorrectly showing an open credit when a payment was made by credit card.

We fixed this to properly update vendor credit records and track credit card payment amounts when applying payments to vendor credits.

Service/Job expense on PO defaults to O [00157415, 0127777]

The Service/Job field that appeared on the expense line of POs defaulted to O when the PO was created from a service ticket. When created on the vendor it defaulted to J. Users could not determine how to change it or where in SedonaOffice the defaults could be changed. This caused an issue on service tickets where the ticket number could not be saved on the expense line because the Service/Job field was not S, therefore subcontractor expenses were not tied to the service tickets.

We resolved this to save the ticket line correctly into the expense line item. Now it loads the ticket correctly.

Vendors - Applying a payment [62837]

When selecting Pay Bills to an Open Invoice, an Open Credit would be created.

Credit should have had its payment applied instead of being outstanding. The Balance is now set to 0 and the Applied amount to the applied credit. This in effect closes the Credit. It no longer appears in the Open Credits but is still listed in the Credit list as a closed Credit.

Job Management

No warning message when manually changing a Non-PW labor grade direct rate

There was no warning message when users manually changed a non-prevailing wage on timesheets.

We added a warning message on time sheets that alerts users when they change the pay rate.

Client Management

Creating invoice from ADI invoice file needs fixed

Our stored procedure that creates invoices from ADI invoice files only looked for files that started with '01'; however, it also needed to look for files that started with '81001'.

We updated the ADI_Next_Invoice_To_Create stored procedure to look for 81001 in addition to 01.

Service

Service Ticket Not Printing

Users could not print usable service tickets.

We corrected the service ticket formatting so that service tickets can print as expected.

Report Manager

6.2.0.22 Update caused format issues for invoices and vendor open items report (158917) [00161009]

The Vendor Open Items Report was misaligned when users printed it.

To resolve this, we changed the printer setting from A4 to default printer. This report has two options: Details and total only. Both reports now have the same printer set up.

Stored Procedures

New Stored Procedures

Job_Cost_Other

Updated Stored Procedures

ADI_Next_Invoice_To_Create

Customer_Jobs_Get

Job_ADD

Job_UPD

Database Tables

New Database Tables

OE_Job_AIA_702

OE_Job_AIA_703

Updated Database Tables

OE_Job

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 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 1.54.0 (or later)