Release Notice
Version 6.2.0.5

March 2022

Confidentiality Statement

All information contained in this document is provided in confidence and shall not be published or disclosed wholly or in part to any other party without the expressed prior written permission of Bold Group. It shall be held in safe custody at all times. These obligations shall not apply to information which is published or becomes known legitimately from sources other than Bold Group.

Acknowledgments

The information contained in this document represents the current view of Bold Group on the issues discussed as of the date of publication. Bold Group must continuously respond to the changing market conditions; therefore, it should not be interpreted to be a commitment on the part of Bold Group. Bold Group cannot guarantee the accuracy of any information presented after the date of publication.

This paper is for informational purposes only. The system descriptions and diagrams contained within should be used as guidelines only. Each Bold Group installation might require modifications to meet specific requirements. BOLD GROUP MAKES NO WARRANTIES, EXPRESS, OR IMPLIED IN THIS DOCUMENT.

Microsoft and Windows are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries. Likewise, the other products, services, and company names referred to in this document, to include all trademarks or registered trademarks of their respective owners, are all hereby acknowledged.

Copyright

Registered Office: 4050 Lee Vance Drive, Colorado Springs, CO 80918 USA

CONTENTS

ABOUT THIS DOCUMENT 5
SPECIAL UPGRADE / INSTALL INSTRUCTIONS 6
SUPPORTED ENVIRONMENTS 6
ENHANCEMENTS / FEATURES 7
CLIENT MANAGEMENT 7
Copy and Paste email address in Customer Billing Email Address Tab 7
Added Additional Name to the AR Search Results 9
JOB MANAGEMENT 10
WeSuite Custom Job Costing Bucket Support 10
SALESAUTOMATION 11
New Quick Quote Feature 11
EFORMS 12
New Shared Data Fields 12
APPLICATION CORRECTIONS 13
ACCOUNTS PAYABLE 13
Unable to save a Payment Address in a Different Country 13
ACCOUNTS RECEIVABLE 13
EFT Processing – Response Code A01 not Creating a Payment Record 13
Activity Ledger Incorrect When Transferring Unapplied Cash 13
CLIENT MANAGEMENT 14
OPT Button on Bill To form 14
Invoice Error “3021” 14
SedonaEmail Invalidating Email Addresses 15
Creating a New Inspection Record 15
Unable to Print Inspection Items Report 16
JOB MANAGEMENT 17
Advance Deposit Payments 17
Runtime Error Received when Importing a Job from WeEstimate 17
The same Part on Multiple Lines in Materials List only Pulls One Line into PO 17
Costing Does Not Transfer from WeEstimate 17
Verify G/L Accounts when Posting Labor 17

QUERY BUILDERS **18**

Job Query Builder *18*

REPORT MANAGER **19**

Payments by Employee Report *19*

eFORMS **19**

Tab Index Incorrect *19*
Signature Moves to Next Page upon Submission *19*
Active Forms Search by Percentage not Working *20*

SALES AUTOMATION **20**

Unable to Delete RMR on a Proposal *20*

TIME&ATTENDANCE **21**

Issues with Clocking Out *21*
Unable to Approve Payroll – Error Message Received *21*

About This Document

This document provides information related to software enhancements and application corrections for SedonaOffice after version 6.2.0.4.

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 – For SedonaCloud customers, 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 SalesAutomation, 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 1.40.1.2 when you update SedonaOffice to 6.2.0.5.

Minimum System Requirements

Server is on Microsoft .Net 4.6.1

Enhancements / Features

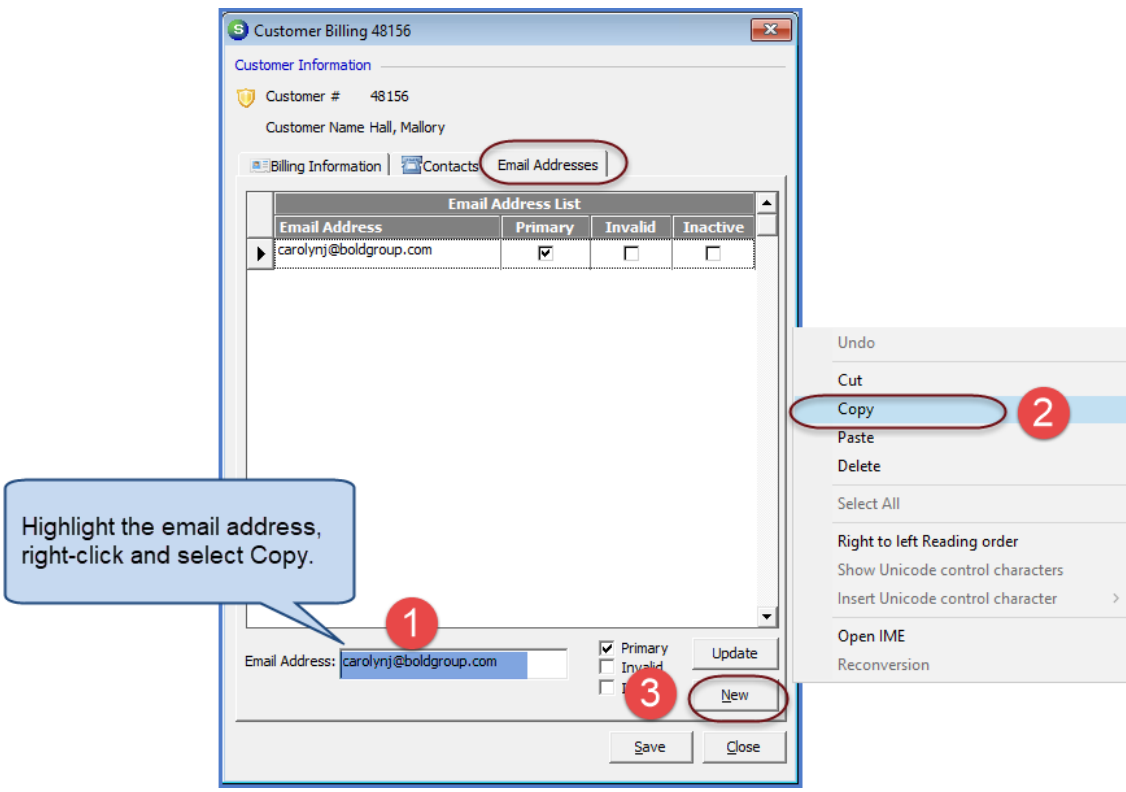
Client Management

Copy and Paste email address in Customer Billing Email Address Tab (22496, 23840) [4022]

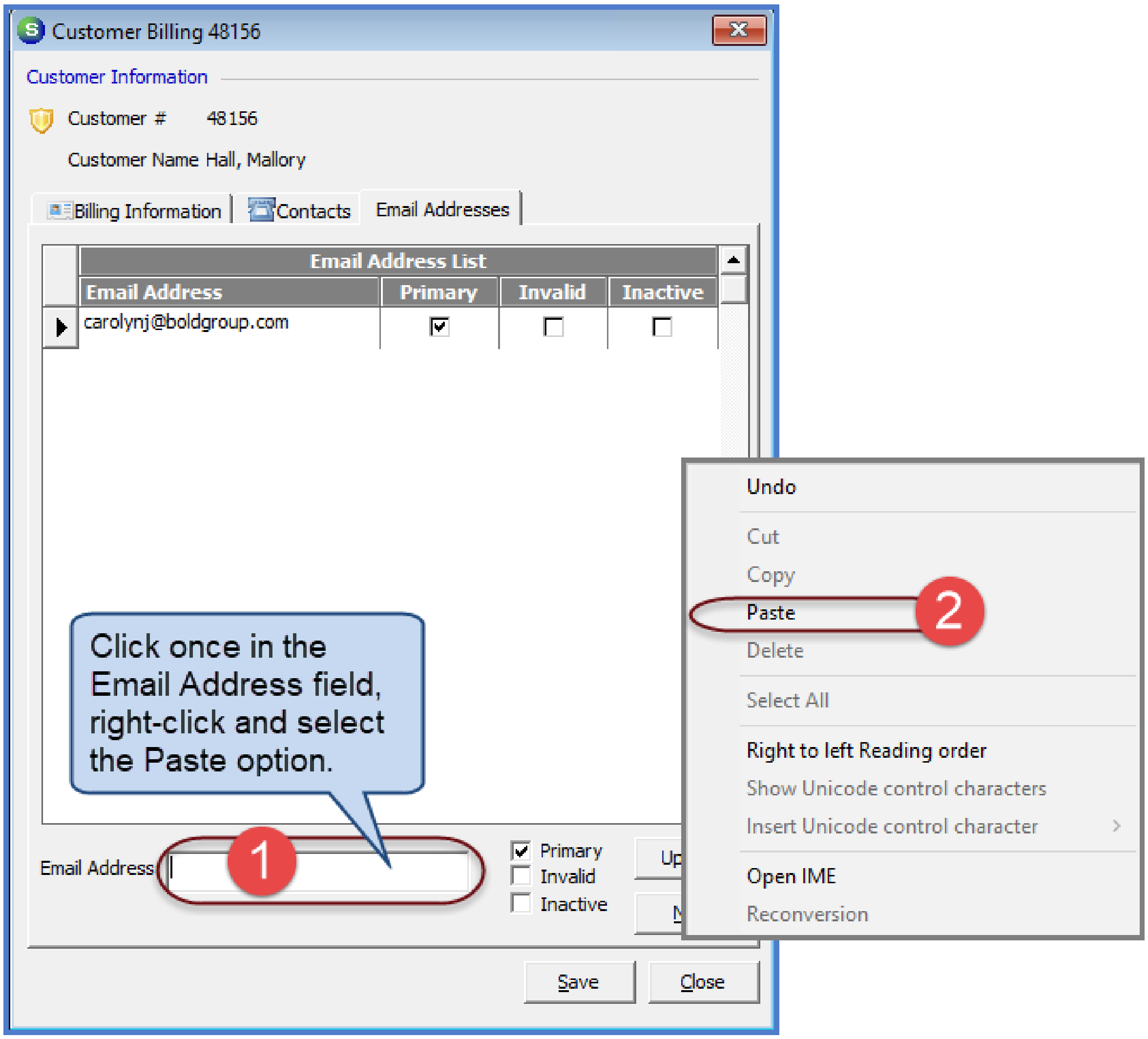
New fields added to the bottom of the customer billing email address tab allow you to paste the email address and select whether the email is Primary, Invalid, or Inactive. The email address list at the top of the screen is now display only. You may select the row at the top of the screen and add or edit the fields displayed for that record at the bottom of the screen.

To copy an email address and use for a new email address, follow the instructions below and on the following page.

1. Open the Bill To record, and then click on the Email Addresses tab. Click once on the email address you want to copy. The email address will appear at the bottom of the form. Highlight the email address data, right-click and select the Copy option. Next click on the 'New' button.

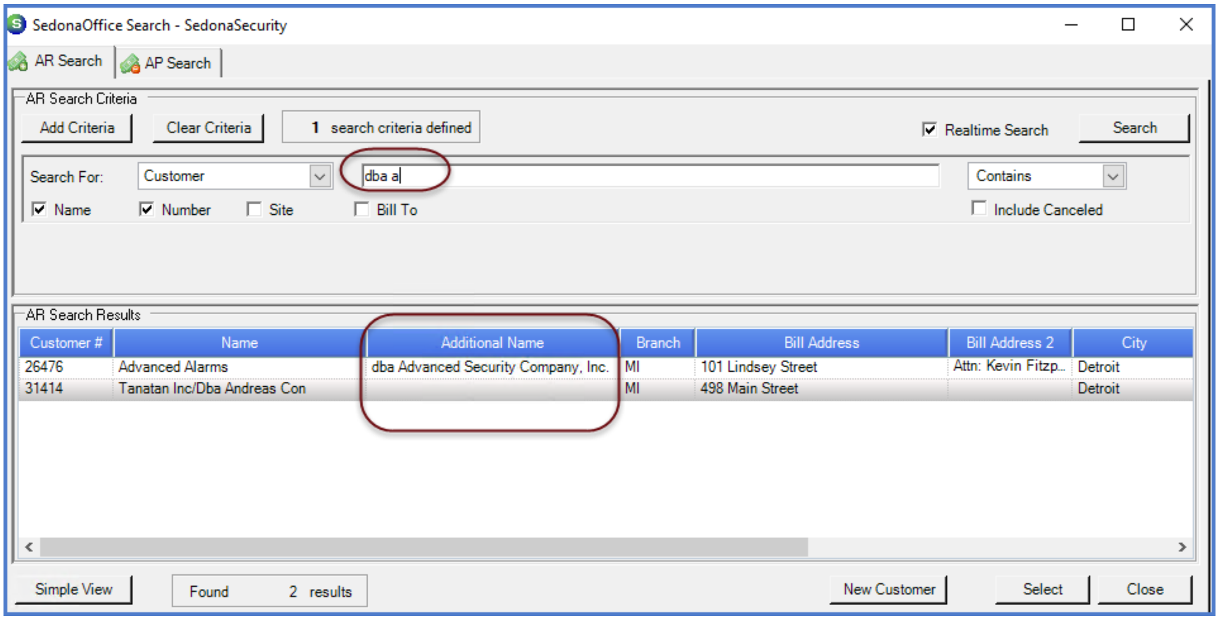


2. The Email Address field of the new record will be blank. Click once in the field, right-click and select the Paste option. The email address that was copied will fill into this field. Make the necessary changes, and then click the Save button at the bottom right of the form when finished.



Added Additional Name to the AR Search Results (23844)

When using AR Search you can enter the data from the Customer's Additional Name field from Customer billing information into the search field and the AR search results will contain a column displaying the Additional name.



Job Management

WeSuite Custom Job Costing Bucket Support

Generally, companies will have multiple job costing 'buckets' that do not line up with the costing functions provided by the software such as labor and materials. An example of one of these buckets would be equipment rental. Because we do not have any specific function in the software to specifically track equipment rental, users will utilize a custom job costing bucket to track those costs manually and separately from the rest of their costs.

We are providing users the ability to ensure that when each separate cost/charge is rolled up into one installation item on the SedonaOffice Job, any costs on the WeSuite Proposal specified as being associated with one of those custom job costing buckets, gets added to the proper job costing bucket when the proposal is completed and turned into a Job in SedonaOffice.

SalesAutomation

New Quick Quote Feature

This new feature allows users to select an existing lead, an existing customer, or create a new lead when only minimal information such as name, phone or email is provided.

- Streamlines the proposal creation for new leads by creating the new lead and proposal in one step.
- Allows for multiple 'What if' scenarios prior to saving the Quick Quote to a proposal. The user can change the Sales Package, quantities, and/or total labor hours. The totals on the Quick Quote immediately reflect the changes.
- A new Questions Toolbox is only available when creating Sales Packages. These are basically user-defined fields. The field types available are:
    - Dropdown
    - Checkboxes
    - Multiple Choice [radio buttons]
    - Text Input
    - Number Input
    - Multi-line Input

  The user can customize the labels and options of each of the toolbox types. Each Sales Package can have a different set of questions that are pertinent to the package.

  Adding Questions to the Sales Package allows the user to define specific questions to ask the prospect/customer to customize the Quick Quote based on the responses provided. The questions toolbox option types can be set to required, to aid the user in gathering the information required by you company, to improve the quality of the quote.
- A new Time Window field on the quote allows the user to define a window of to give the lead/customer as an estimate of when the work can be planned to be performed.
- A new Map Code field allows the user to use the address defined or use a custom code on the Quick Quote.

For setup and functionality instructions for the New Quick Quote feature, please refer to reference document SalesAutomation – New Quick Quote, which is available for download at https://learn.boldgroup.com/.

eForms

New Shared Data Fields

Prior to this current release, there were no shared data fields available for totaling items or parts that could be used on a proposal. With this release, two new Shared Fields have been added under Proposal based eForms:

- Items Total which displays the total amount of all items on the proposal
- Parts Total, which displays the total amount of all parts on the proposal.

Note - These two new fields were implemented without labels, in order to facilitate those customers using pdf templates with their eForms data.

Application Corrections

Accounts Payable

Unable to save a Payment Address in a Different Country [14360]

Issue: Unable to save a different country address in Payment address while adding and updating vendor information. The country of the Vendor address and Payment address must be the same.

Solution: A new column was added to the ap_vendor table to allow for a country to which a payment is being issued, that is different from the country associated with the vendor address [used on purchase orders]. Previously there was only one column for both addresses, Country_Id. This allows you to save an address for the payment address with a different country than the vendor address.

Accounts Receivable

EFT Processing – Response Code A01 not Creating a Payment Record [13935, 15818, 20256]

Issue: EFT Processing is not always creating a deposit check where the transaction is showing as Settled and the response code is A01.

Solution: The code was changed to catch errors causing this issue. If additional errors that are not expected are encountered, the transaction status will change to 'Orphaned', and a record will be sent to the error log.

Activity Ledger Incorrect When Transferring Unapplied Cash [4562, 4583]

Issue: When transferring unapplied cash from one customer to another, the receiving customer's activity ledger was not being updated correctly.

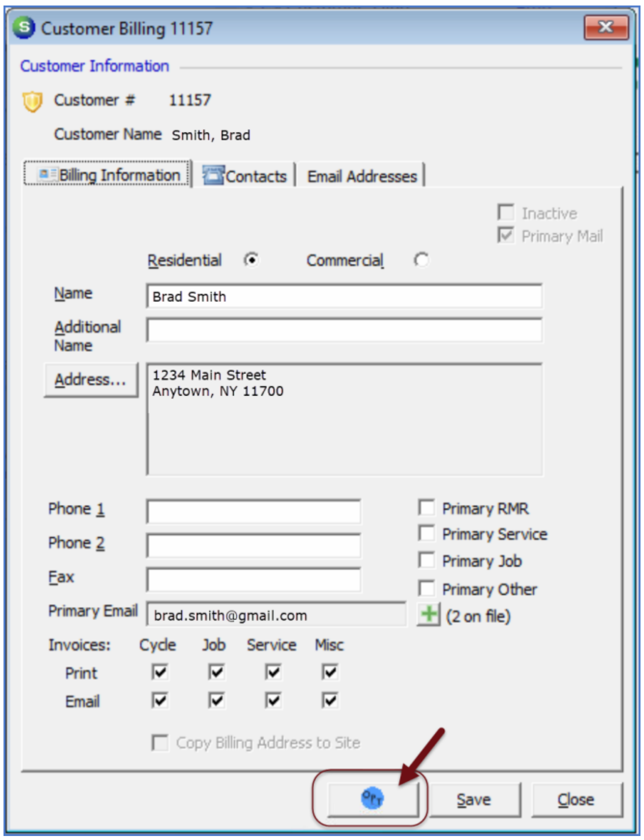
Solution: The software has been show the correct ending balance on the activity ledger.

Client Management

OPT Button on Bill To form [20623]

Issue: For SedonaOffice customers who have subscribed to services with our business partner, OPT Business Services, the OPT button displayed on the customer bill to record is not active.

Solution: This issue has been corrected. Now, when on the Customer Bill To record, clicking on the button now opens a browser to the web page in the OPT tables.



Invoice Error "3021" [29500, 37232]

Issue: When users are on the invoice screen and save an invoice and look up a new customer they receive the error message '3021 Either BOF or EOF is True, or the current record has been deleted'. This cause the SedonaOffice application to close.

Solution: The code has been changed to prevent this from occurring.

SedonaEmail Invalidating Email Addresses [26703]

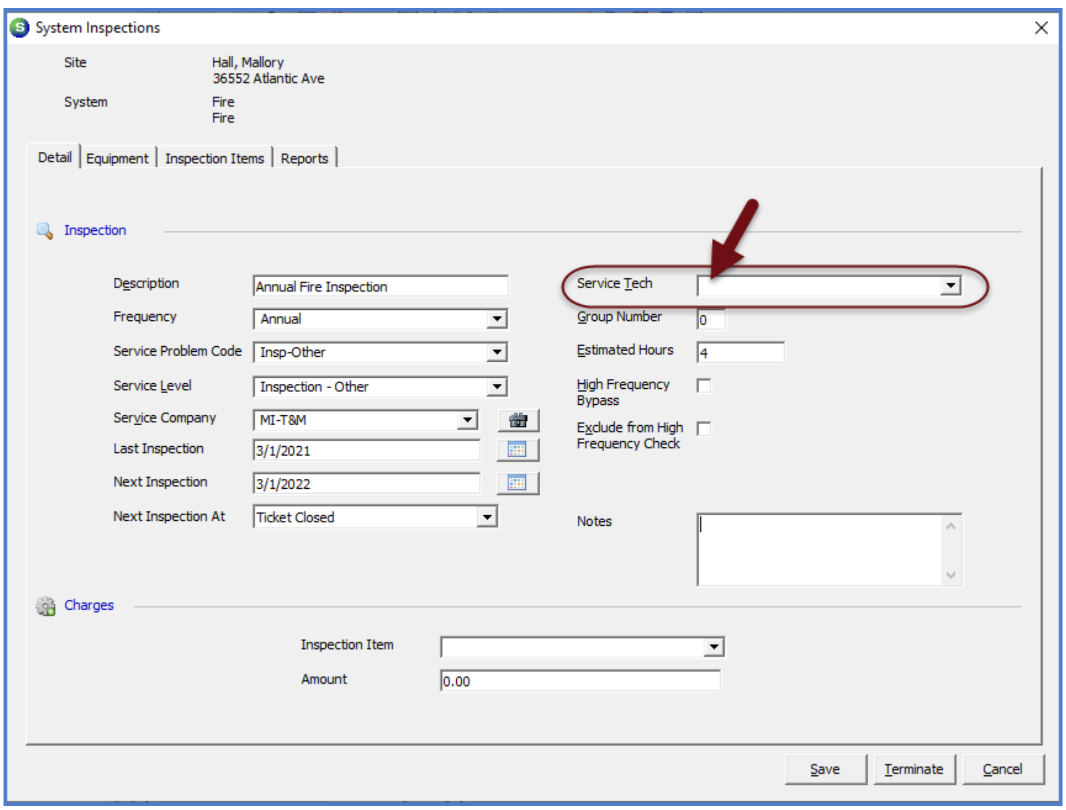
Issue: For customers using SedonaEmail, the application is invalidating email addresses, seemingly at random and not consistently.

Solution: When an Invoice email is sent, the application returns a status indicating whether it was delivered. The "Soft Bounce" status is one that indicates that the email could not be delivered at this time, but the email address is valid; subsequent attempts to send emails to this address may succeed. We have added a check to ignore any emails that have a status of "Soft Bounce", since this could be a temporary condition.

Creating a New Inspection Record [4292, 4498, 19815, 22735]

Issue: When creating a new inspection record, the application will not allow you to leave the Service Tech field blank.

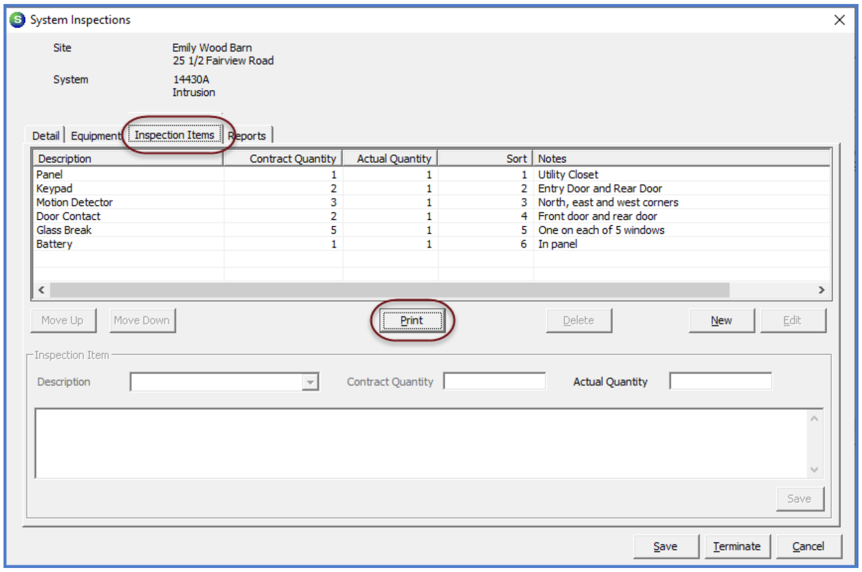
Solution: The software has been corrected to not require the user to make a selection in the Service Tech field.



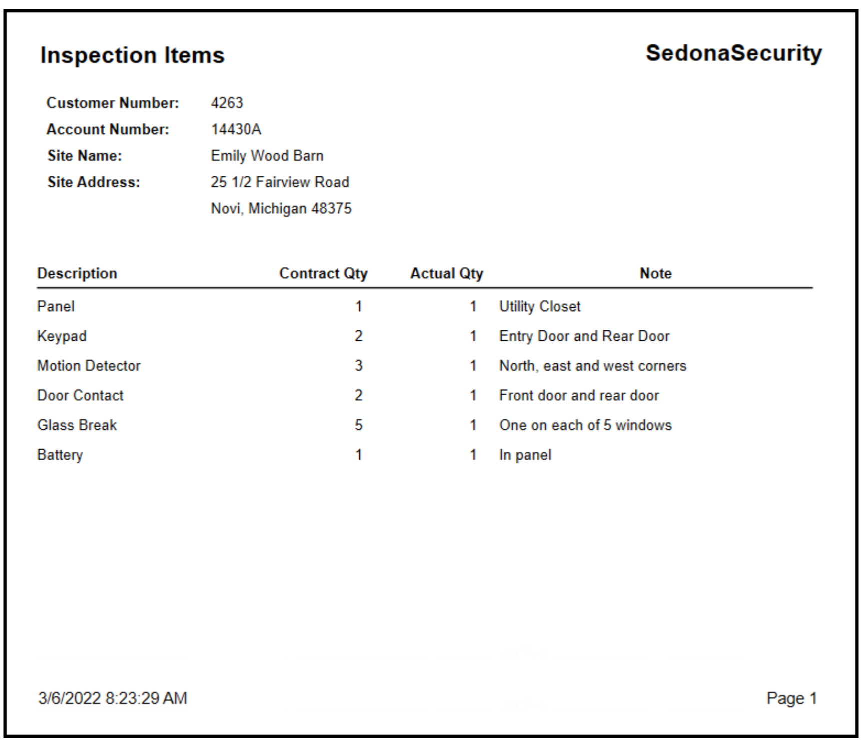
Unable to Print Inspection Items Report [41320]

Issue: If a list of Inspection Items are created on a System Inspection record, when clicking on the Print button, no report is generated.

Solution: Map the correct path when the report is being generated.



Inspection Items Report



Inspection Items

SedonaSecurity

Customer Number: 4263
Account Number: 14430A
Site Name: Emily Wood Barn
Site Address: 25 1/2 Fairview Road
Novi, Michigan 48375

Description	Contract Qty	Actual Qty	Note
Panel	1	1	Utility Closet
Keypad	2	1	Entry Door and Rear Door
Motion Detector	3	1	North, east and west corners
Door Contact	2	1	Front door and rear door
Glass Break	5	1	One on each of 5 windows
Battery	1	1	In panel

3/6/2022 8:23:29 AM

Page 1

Job Management

Advance Deposit Payments [27220]

Issue: Removing an advance deposit from a job invoice and applying it to another invoice for that job causes a second application/removal of that advance deposit to the initial invoice along with GL activity.

Solution: The software has been changed to correct this condition.

Runtime Error Received when Importing a Job from WeEstimate [36919, 38798, 38887, 39257, 39888]

Issue: Receiving runtime error when importing a job from WeEstimate.

Solution: Certain functions were being called that were not needed for WeEstimate Jobs. The code was changed to only call those functions if not coming from WeEstimate.

The same Part on Multiple Lines in Materials List only Pulls One Line into PO [4263, 34963]

Issue: When the same part is on different lines on the materials tab for a job with the same location, only one instance of the part is pulled into the PO.

Solution: Implemented check if there is no location mentioned and the same part is entered twice on one phase then it display part twice in PO.

Costing Does Not Transfer from WeEstimate [20370]

Issue: Costing does not transfer from WeSuite to SedonaOffice job costing when combing invoice items.

Solution: The cost was not transferring because it was mapped to the "default" cost. Mapped the SedonaOffice install cost to the cost as provided in the result set.

Verify G/L Accounts when Posting Labor [5046]

Issue: When posting labor to a job, the N/A Account code was being used in a certain situation. On the Job Type setup Costing form, if the Labor to GL is selected, and Expense through WIP is checked, but the Labor accounts fields are blank.

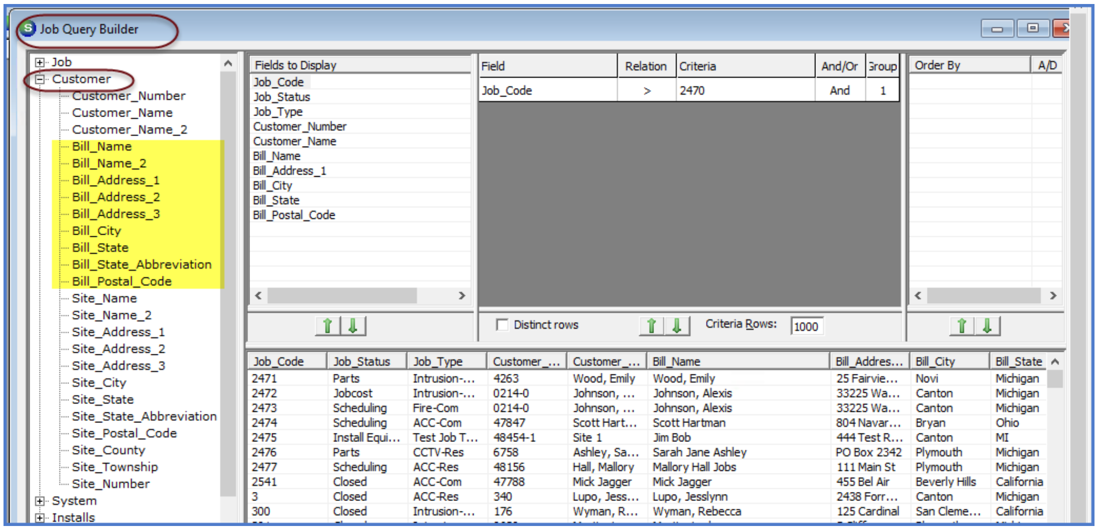
Solution: Validation for Labor Expense, Labor Deferred and Labor WIP has been added.

Query Builders

Job Query Builder [20353]

Issue: When designing a query with the Job Query Builder, and selecting billing related fields from the Customer Group, the query results was showing the primary Bill To related information and not the Bill To information indicated on the Job Bill To form.

Solution: This had been corrected to display the correct information that is related to the Bill To record selected on the Job Bill To form.



Report Manager

Payments by Employee Report [7532]

Issue: For payments that were applied to Cycle invoices, the User who entered the payment was not appearing on the report.

Solution: Changed to display the name of the User who entered the payment for a cycle invoice on the report.

Note: Payments posted to invoices via EFT Processing will not display a user name in the ‘Enter By’ field – this field will be blank for EFT transactions.

eForms

Tab Index Incorrect [1168]

Issue: Tab index is jumping to Signature field out of sequence. No way to index signature field and put it in the correct sequence.

Solution: The Tab Index field is not available for Signature fields. It is only available for Data Bound Elements, which include: Shared and Form fields, Radio buttons, and Payment Methods. All other fields (like Signature) are not classified as Data Bound Elements, and do not allow users to see or change the Tab Index. To resolve this, Signature and Initials fields will have their tab indexes set to 0. This should make it so they will always be the "last" elements jumped to when tabbing.

Note: This is a change for forms going forward; it does not affect existing forms.

Signature Moves to Next Page upon Submission [24062]

Issue: eForm looks correct on the eForm editor and on the customer end, but once the form is submitted, the signature and sometimes the date get pushed to the next page. This issue is caused by the Payment Method box above the Signature/Date fields. When a payment is selected and the form is signed and accepted, the payment information is shifted vertically downwards, which pushes fields below it downwards as well. This results in the signature and date showing on the second page.

Solution: To address this, the Payment Method box will be changed to show the selected payment information more appropriately on a single line.

Active Forms Search by Percentage not Working

[30670, 31558]

Issue: When you attempt to use the filter on the percent completed column of the Active eForms it does not work.

Solution: The problem was due to the progress column, indicating the percent of recipients who signed the form. Due to the design of this column, filtering/sorting will not work. To resolve this, a new field is created, called Form Progress, and will track the percent of completed recipients over total recipients. This value is rounded to the nearest integer, and will allow sorting/filtering.

Sales Automation

Unable to Delete RMR on a Proposal [28748]

Issue: The delete button is not accessible to remove any RMR items inside of the proposal tab for any customer.

Solution: This was a display issue. The delete button was not being displayed because the column was too narrow. The column has been expanded to accommodate both the Edit and Delete buttons.

Time&Attendance

Issues with Clocking Out [11517]

Issue – When clocking out on a shift or to end a task, an error message is presented several times before the application will let you clock out or end the task. When viewing the record the next day, it appears that you actually have not clocked out.

Developer investigation: The problem is an artifact of having Shift Rounding enabled, and ending a Task within the active shift, and then immediately trying to end a Shift. The issue was caused by shift rounding, and is only applied to shift start and end times and not task time. Tasks are clocked to the exact time of the start or end task action. Depending on which half of the 5-minute shift time boundary the task end and end shift time is being executed, the end shift logic may be trying to round the shift end time to the 5-minute boundary, which may be earlier than the already ended task time.

Solution – Shift rounding logic fixed to handle end shift times that are rounded down to an earlier time than the end time of the last completed shift task. If that scenario is found, the shift end time is rounded up to the start of the next shift time boundary. In addition, shift start checks if the previously completed shift has a shift end time later than current time due to the above shift time rounding scenario. If found, then the new shift will start at the next shift time boundary to ensure no overlapping shift times.

Unable to Approve Payroll – Error Message Received [37138, 38035]

Issue: When a manager adds a tracked paid time off to a time sheet, such as a holiday paid time off, the system will save it on the back end but it will not show up on the timesheet. Consequently when the manager tries to approve the payroll, the error in question shows up saying there are PTOs waiting to be approved.

Solution: The software was changed to correctly set the PTO Approved Date and the PTO Approved by User, when new PTO data is added through either the 'Add New Employee Shift' or the 'End Shift' when viewing Pay Period Details.