# SedonaOffice Release Notes

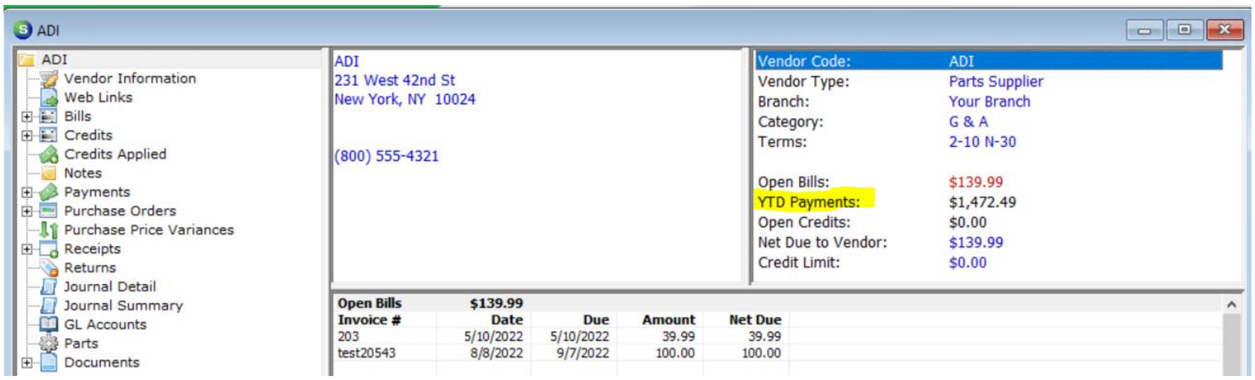
September 2022

# Contents

# Enhancements/Features

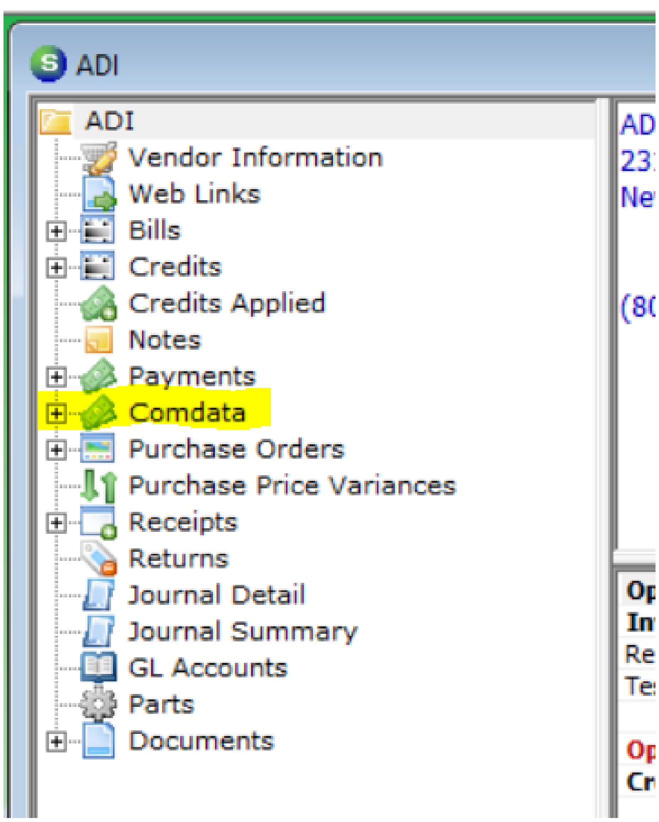
## Added a YTD (Year to Date) Payment Amount Field to Vendors

On the Vendor information screen, there is a new field showing the year-to-date payments based on current fiscal year made to a vendor.

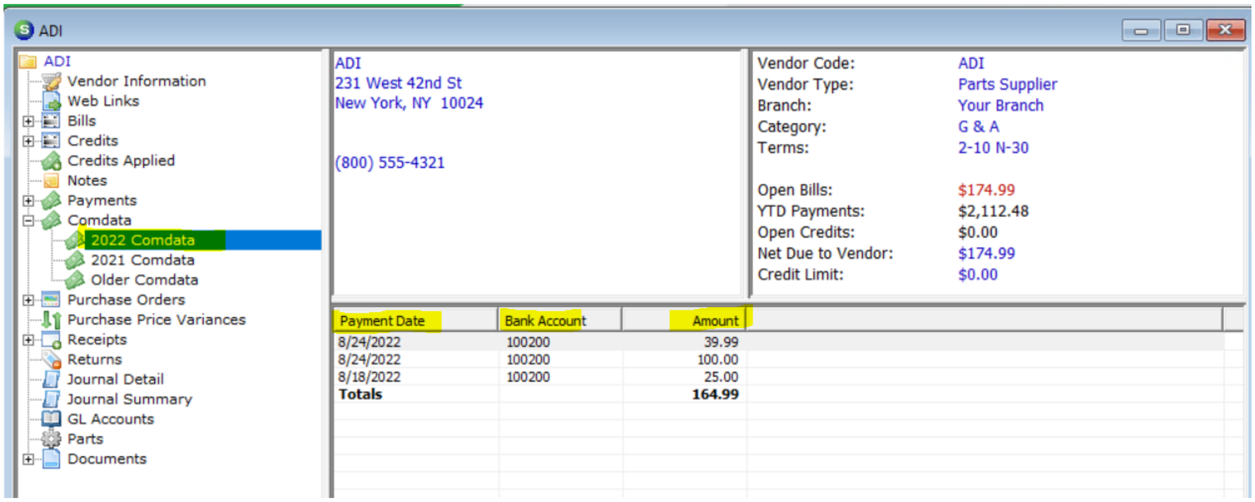



## Electronic Payment Vendor Tree Node (Comdata)

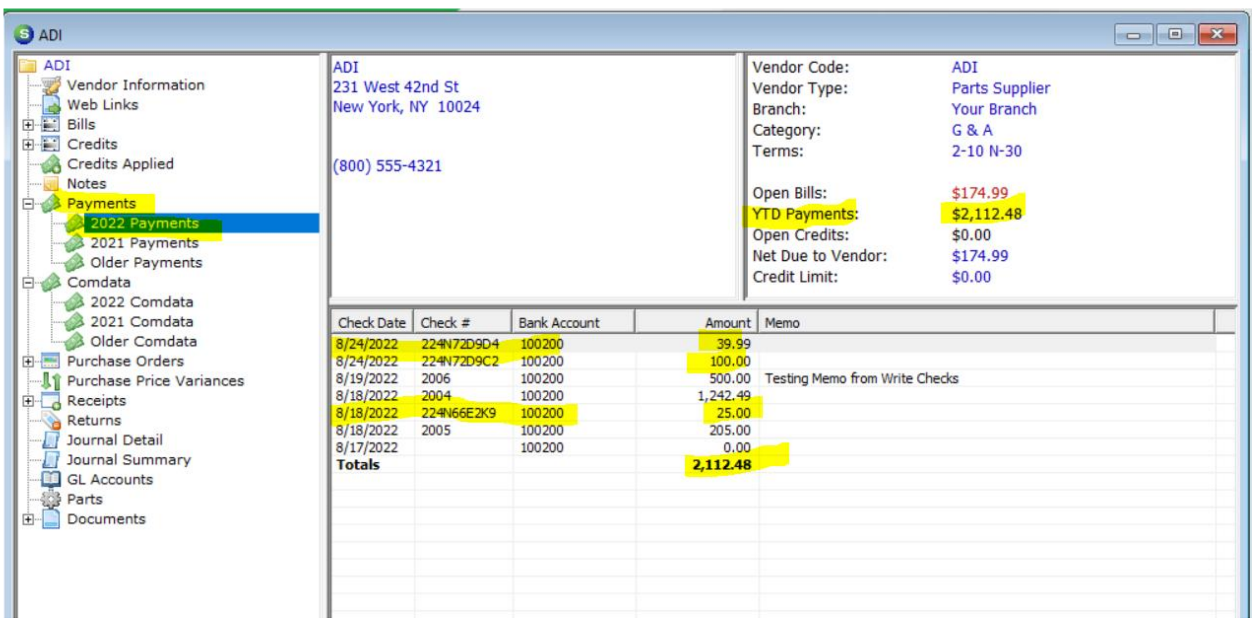
For dealers using Comdata for electronic payments, these payments are visible:



Users can see details for Comdata payments:

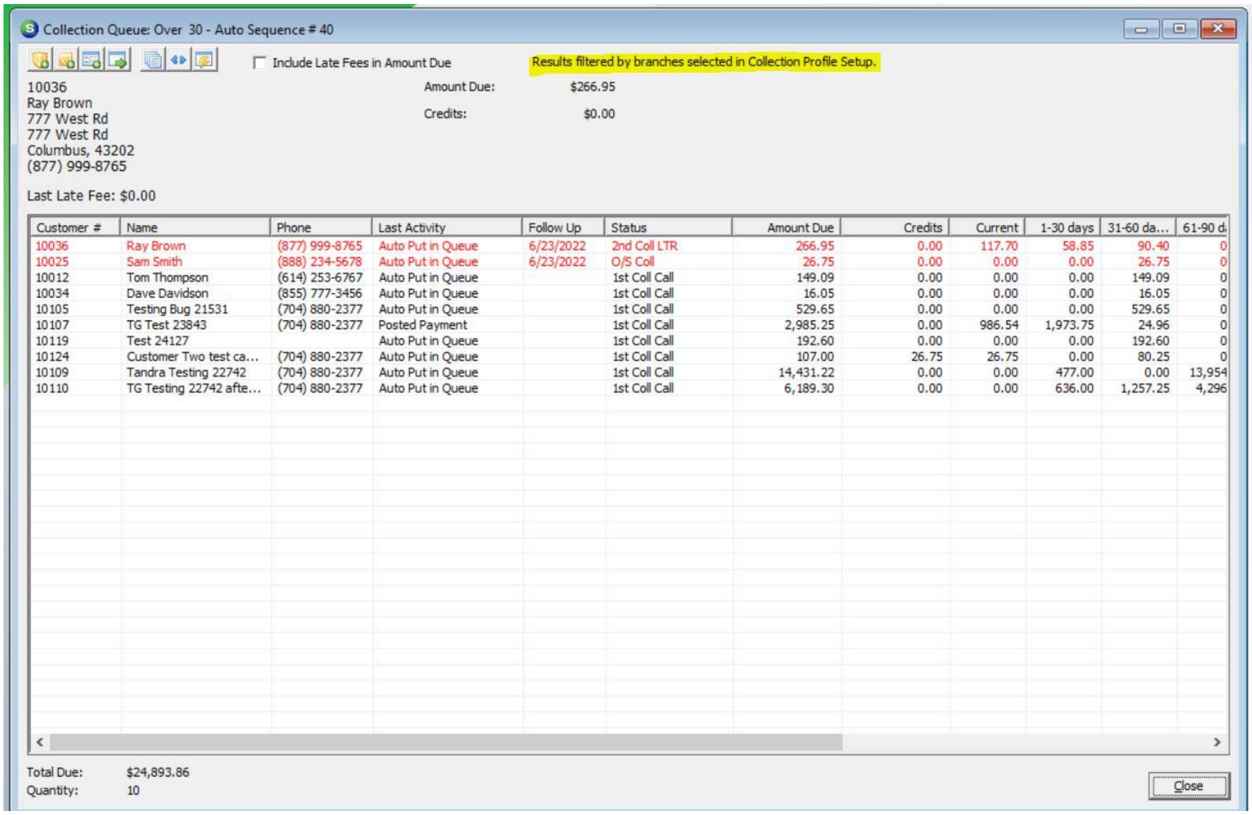



Users can also see Comdata payments included with all other payments:



# Collection Queue Indicates when Results have been Filtered

When users filter the Collection Queue, there is a new message at the top of the Collection Queue screen to the right of the Include Late Fees in Amount Due check box that says "Results filtered by branches selected in Collection Profile Setup".



# Application Corrections

## Accounts Payable

| Resolved Issues |
| --- |
| **Trial Balances out of Balance**<br><br>Corrected an issue with re-saving an AP bill with changes to an expense line that had a branch different from the bill header branch that would cause branches to be out of balance on the GL. |
| **Point of Sale - updated cc that has been declined are not recorded**<br><br>Updated the calculation for the amount due so that if a credit card transaction is declined and reprocessed the amount due is properly updated. |
| **Cannot take AP Bill off Payment Hold**<br><br>Corrected an issue that was preventing users from taking a bill, linked to a closed job with WIP, off payment hold by enabling the Save button on bills that are tied to closed jobs with WIP. Users can edit these fields on the bill: Hold Payment checkbox, Reference Number, Terms, Payment Date, and Memo. |
| **Cannot open receipt once returned to vendor**<br><br>Resolved an issue with users being unable to open a receipt once it was returned to vendor by saving the receipt ID of the original receipt before creating the return, so that it can be used to open the original receipt. |
| **Documents Tab in Vendor PO is unaccessible**<br><br>Resolved an issue that was preventing users from seeing the list of documents that they have uploaded to a purchase order. |

# Accounts Receivable

| Resolved Issues |
| --- |
| **View Checks Error - Cannot view details of a deposit**<br><br>Resolved an issue within a payment batch that would cause a runtime error when clicking the View Checks button. This was caused when the transaction status had a null value. Now the program treats the null value as an empty string. |
| **Miscellaneous Invoices created as cycle bills**<br><br>Resolved an issue creating an invoice from the invoicing module under accounts receivable where the type was automatically changing to "Cycle Bill" when the invoice was created. Now when creating an invoice through Accounts Receivable > Invoicing and selecting an invoice type, the invoice type remains as selected when the invoice is saved. |
| **Site Address not correct on printed Invoice**<br><br>Resolved an issue with a printed invoice showing the old address when users created the invoice and changed the site address on the invoice. |
| **Advance Deposit Applied twice to invoice**<br><br>Resolved an issue when there is more than one advance deposit being applied to an invoice when it should not. |

# Client Management

| Resolved Issues |
| --- |
| **Sedona Collection Queue Issue - customers remain in collection queue when their branch is removed**<br><br>Changed the checks for the collection queue to make sure the customer's branch matches a branch used by the collection. |

## Job Management

| Resolved Issues |
| --- |
| **Locked column is blank on Job Tasks applied from a template**<br><br>Resolved an issue with the Tasks grid not displaying the Locked column. |
| **Custom Job Label missing after update**<br><br>Recreated the Custom Job Level Report and added it so that it will launch from the menu. |
| **Stock setting does not carry over to Materials when adding a part via Tools > Issues/Parts**<br><br>Added the Stock setting when adding a part using Tools > Issue parts. |
| **Error when looking up job statuses in job list and using the enter key**<br><br>Fixed an error (Run-time error '91': Object variable or with block variable not set.) that occurred when pressing the enter key while in a filter list. |
| **Service Module - Open Jobs not displaying**<br><br>Resolved an issue where the Service Module was not showing the list of open jobs. |
| **Part costs pulling into jobs when job type is marked as Zero Part Price**<br><br>Resolved an issue where customers were experiencing the Zero Part Price option being randomly ignored in jobs. |

## Inventory

| Resolved Issues |
| --- |
| **Type Mismatch error with retrieving data from Specific Warehouse Journal**<br><br>Resolved the error (13 Type mismatch) when navigating to a warehouse and accessing a journal. |

## Service

| Resolved Issues |
| --- |
| **Error Messages when doing third party billing unable to bill out service**<br><br>Resolved error messages when doing third party billing with these changes: when a customer is selected for Third Party Bill To on a Service Ticket, the default is the Bill To of the customer that is defined with 'Primary Service' checked. The dropdown will display all active Bill To addresses associated with the customer selected. If the user selects another Bill To that is not defined with 'Primary Service', there is a message that will alert the user that the Bill To is not the primary, confirming that they want to use an alternate bill to. |
| **Billed invoices showing $0 amount when posted on accounts**<br><br>Resolved this issue by blocking users from creating an invoice when they have unsaved changes. |

## Integrations

| Resolved Issues |
| --- |
| **WeSuite - imported jobs are losing original user on notes**<br><br>Resolved an issue with having the create user of a note overwritten when importing a WeSuite job; now importing a WeSuite job preserves the username that created the note in WeSuite. |
| **Error when running dealer billing post report in Manitou**<br><br>Resolved an error displayed when running the dealer billing post report by adding the missing 'tax exempt' parameter to the stored procedure Invoice_Item_ADD. |
| **WeSuite - Material Burden not getting allocated to 'other' cost bucket**<br><br>Resolved an issue with material burden not being added to the other cost bucket on job costing by adding the material burden to the Estimated other section for job cost, which puts this value in the appropriate section. |

# Stored Procedures

Stored Procedures Updated:

Invoice_Item_ADD

WS_Account_Register (Updated for SedonaWeb 2.0 customer registration issue - Clients cannot create SedonaWeb users. This change requires an update to SedonaAPI version 1.42.0.)

# Special Upgrade / Installation 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 Sales Automation module.

If you are not a SedonaAPI 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 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

**SedonaAPI Users** - If your company uses SedonaAPI in any manner (Sales Automation, Time & Attendance, eForms, SedonaWeb 2.0, or the SedonaAPI for integrations such as the Manitou integration), you need to update your SedonaAPI to version 1.42.0 when you update SedonaOffice to 6.2.0.8.

## Minimum System Requirements

- Server is on Microsoft .Net 4.6.1