



SedonaOffice Release Notes

December 2022

SedonaOffice[®]

Contents

Enhancements/Features.....	2
Void Payments from EFT Processing.....	2
SedonaOffice Customer Registration Code	2
Registration Code to be Added to Invoice Templates	4
Bank EFT Processing Manual Approval Popup	5
Application Corrections	6
Accounts Payable.....	6
Accounts Receivable	6
Client Management.....	7
Inventory	8
Report Manager.....	8
Setup.....	8
Stored Procedures	9
Special Upgrade / Installation Instructions	9
Supported Environments.....	10
Minimum System Requirements	10

Enhancements/Features

Void Payments from EFT Processing

We have added functionality to allow users to void payments from an EFT transaction through EFT history. This was a feature that was previously available in SedonaOffice version 5 and has been implemented in version 6.2.0.9.

SedonaOffice Customer Registration Code

We added the registration code field with a command button to generate a new registration code to the Customer Setup screen:

Customer Setup 10290

Customer # 10290
Customer Name Island Campground
Additional Name
Island Campground Bill-To
44981 East Side Rd
Bill To 1
Washington Island, WI 54246

Setup Information | Custom Fields | Bill To | Master Account Setup | Items

Customer Status AR
Customer Type Commercial
Old Customer ID
Terms Due On Receipt
Tax Exempt #
EIN
OK to Increase
Salesperson
Blanket P.O.
P.O. Expire Date
Customer Since 9/26/2021
Chain Account
Customer Group GRP1
Customer Group 2
Branch Your Branch
Invoice Group None
No Collections
Part Pricing Level None

Registration Code E7C6ED

Master Account Information
 Is Master Account
Master Acct

Invoice Printing
 Print Statements
 Print Site Info on Invoices
 Separate Cycle Invoice for Each Site
 Charge Late Fees

Critical Message
Expires On

Save Close


The following changes support this change:

- Database change: Added the Registration_Code varchar(6) column to AR_Customer.
- Added the [registration_code] index to AR_Customer.
- Added stored procedures Generate_Random_HexChar and Generate_Random_Code.
- A registration code is generated when a new customer is added.

During the update all customers will automatically get a registration code added. The registration code is visible in edit mode on the Customer Setup screen.

Registration Code to be Added to Invoice Templates

A field for the customer's registration code has been added to the standard forms and the Bridgestone standard form. For the three standard forms, the registration code was added in the upper right under the customer number and date:

Your Alarm Company		Invoice	
555 Somewhere Dr Some Place, USA 5555 (555) 555-1212		Invoice Number	Date
		1044	1/1/2022
		Customer Number	Due Date
		10264	1/1/2022
		Registration Code:	4D3732
 To: Durango West Installers 22744 Highway 160 Durango, CO 81303		Remit To: Your Alarm Company 1234 Somewhere Dr Some Place, MI 55555	
Amount Enclosed: _____	Net Due: \$6.29		<i>Detach And Return Top Portion With Your Payment</i>
Customer Name	Customer Number	PO Number	Invoice Date
Durango West Installers	10264		1/1/2022
Quantity	Description	Rate	Amount
1.00	Durango West Installer, 22744 Highway 160, Durango, CO Add Charges (Added on 09/09/2022)	5.90	5.90
	Tax		0.39
	Payments/Credits Applied		0.00
		Subtotal:	\$5.90
		Invoice Balance Due:	\$6.29

Message that will print on Std invoices - 50 char.			
Date	Invoice #	Description	Amount
1/1/2022	1044	Contracted Services	\$6.29
			Balance Due
			\$6.29
Invoice created by Manitou			



For the Bridgestone standard form, the registration code is centered near the bottom, above the dashed line:

Your Alarm Company 555 Somewhere Dr Some Place, USA 5555 (555) 555-1212		Invoice	
		Customer	Durango West Installers
		Customer Number	10264
		Invoice Number	1044
		Invoice Date	1/1/2022
		PO Number	
		PAYMENTS APPLIED THRU	11/9/2022
		Job / Service Ticket #	
CURRENT CHARGES			
Quantity	Description	Rate	Amount
<i>Durango West Installer, 22744 Highway 160, Durango, CO</i>			
1.00	Add Charges (Added on 09/09/2022)	5.90	5.90
		Subtotal:	\$5.90
	Tax		0.39
	Payments/Credits Applied		0.00
		Invoice Balance Due:	\$6.29
IMPORTANT MESSAGES			
Message that will print on Std invoices - 50 char.			
Invoice created by Manitou			
		Registration Code: 4D3732	Page 1
Please detach and return this portion with your payment to ensure proper credit.			
REMITTANCE INFORMATION			
Customer Number		10264	
Invoice Number		1044	
Invoice Date		1/1/2022	
Due Date		1/1/2022	
Invoice Balance Due		\$6.29	
TOTAL DUE		\$6.29	
Amount Enclosed:			
Durango West Installers 22744 Highway 160		TO:	Your Alarm Company 4234 Somewhere Dr.

Bank EFT Processing Manual Approval Popup

When users would manually submit a payment from the Ready tab to the Approved tab in EFT processing, there would be a confirmation message (Are you sure that you want to proceed? Yes/No) for each transaction (for example, if there was one transaction there was one confirmation, if there were 10 transactions, there were 10 confirmations). This confirmation message has been removed. This means that there is no confirmation when manually submitting payments to Forte.

Application Corrections

Accounts Payable

Resolved Issues
<p>System Errors - Application/Workstation Errors when all branches and warehouses are checked</p> <p>Resolved an issue with the parameter "@branches" by changing varchar(8000) to varchar(max).</p>
<p>Missing Vendor Invoice Date</p> <p>Resolved an issue with the default date for a vendor bill. If the billing date field is blank, the system saves the current date as the billing date.</p>
<p>Vendor PO Received Cost Defect</p> <p>Going to a vendor and looking at received purchase orders that have only expense items (no parts), the received column showed 0. Resolved this by including expense costs in the receipt total cost on the purchase order list screen.</p>

Accounts Receivable

Resolved Issues
<p>Decrease recurring rate for Site RMR does not decrease</p> <p>Resolved this issue so the Reduce RMR field is updated with the Original RMR amount less the Rate Decrease amount entered in the Rate field.</p>
<p>Items disappear from Payment Processing window</p> <p>Resolved a display issue that occurred when clicking column headings after automatically applying an amount to open invoices.</p>
<p>Customer Activity Ledger does not match balance due</p> <p>Resolved an issue with the customer activity ledger not matching the balance due by fixing the stored procedure Customer_Ledger.</p>

Resolved Issues
<p>Print Invoices duplicates each record 7-8 times!</p> <p>Resolved this issue so that when printing invoices duplicates are not printed.</p>
<p>SedonaEmail Advanced Bridgestone Form Printing Incorrectly</p> <p>Resolved this issue by changing the Invoice Bridgestone Advanced.html template to correct the order for address.</p>
<p>Changes for Manitou Dealer Billing Post</p> <p>Two changes made for this integration:</p> <ol style="list-style-type: none">1. Created a new SQL User-Defined Table Type Auto_Invoice_Buffer_Lines_SC that is used by the new Auto_Invoice_Buffer_SC.2. Created a new Auto_Invoice_Buffer_SC stored procedure that is called by Manitou -> SedonaCloud integration via /api/CustomerInvoice/AutoInvoiceBuffer. <p>This requires updates to SedonaCloud (1.43.0) and Manitou (2.1.36).</p>
<p>Allow Edit of Cycle Invoices</p> <p>Resolved this issue by allowing users to edit cycle invoices unless the invoice has been sent to the customer.</p>

Client Management

Resolved Issues
<p>Error when editing billing information to add email address</p> <p>Resolved this error by updating the primary email field on customer billing information when adding or updating the primary email in the list.</p>
<p>Search Filter is not retained when navigating from certain fields</p> <p>Resolved an issue with the Search Filter so that it now retains its settings.</p>
<p>Error Attempting to finish cancelling customer in cancellation queue</p> <p>Resolved an issue causing an error when finishing the cancellation for a customer in the cancellation queue.</p>

Resolved Issues

Cannot add a customer to cancellation queue
--

Resolved an issue with the cancellation queue so that selecting a customer from the search opens the cancellation form.

Inventory

Resolved Issues

Balance Sheet and Trial Balance do not agree

Resolved this issue by allowing users to select only existing accounts in the PPV account field, which prevents transactions from being created that have no GL Account associated with them.

Report Manager

Resolved Issues

Error running AR Aging By Effective Date Extended* report
--

Resolved this issue by including a missing table and stored procedure so that the report can run.

Report displays zero bal accounts when zero balance accounts option is not checked

Resolved an issue with the Income by Category report that was displaying a zero-balance account when users did not select the option for zero balance accounts.

Setup

Resolved Issues

Marking access in another module marks Customer Management

Resolved an issue where selecting rights in a module was also (incorrectly) selecting the Customer Management module.

Stored Procedures

Stored Procedures Updated:

- Customer_Ledger
- Auto_Customer
- Customer_ADD
- Customer_GET
- Customer_UPD

New stored procedures:

- Generate_Random_HexChar
- Generate_Random_Code
- Auto_Invoice_Buffer_SC

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 (latest version 2.7.80) with SedonaOffice version 6.2.0.8 and earlier, we recommend that you transition to using SedonaWeb 2.0. Legacy SedonaWeb 1.0 is not for SedonaOffice 6.2.0.9 or later.

SedonaWeb 2.0/SedonaAPI 2.0 Setup - If your company uses the SedonaWeb/SedonaAPI 2.0, 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 your company uses SedonaAPI in any manner (Sales Automation, Time & Attendance, eForms, or the SedonaAPI for integrations such as the Manitou integration), you need to update SedonaWeb/SedonaAPI to version 1.43.0 (or higher) when you update SedonaOffice to 6.2.0.10.

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

Minimum System Requirements

- Server is on Microsoft .Net 4.6.1