SedonaOffice Release Notes

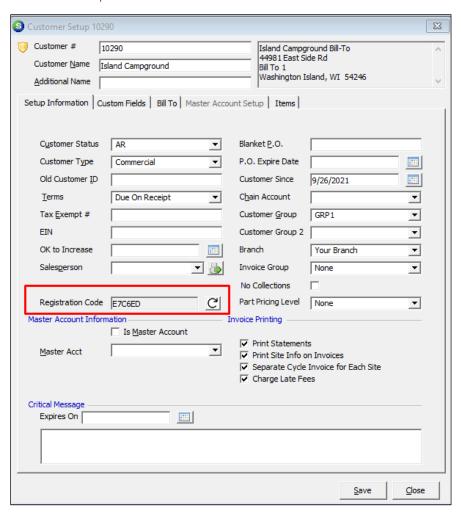December 2022

SedonaOffice®

Contents

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:

The following changes support this change:

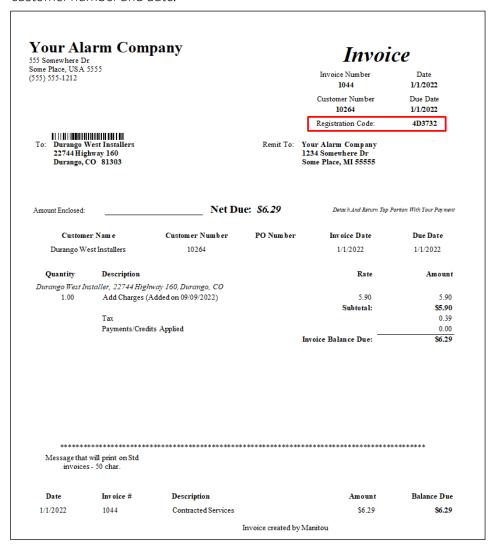- Database change: Added the Registration_Code varchar(6) column to AR_Customer.
- Added the [registration_code] index to AR_Customer.
- Added stored procedures Generate_Random_HexChar and Generate_Random_Code.
- A registration code is generated when a new customer is added.

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.
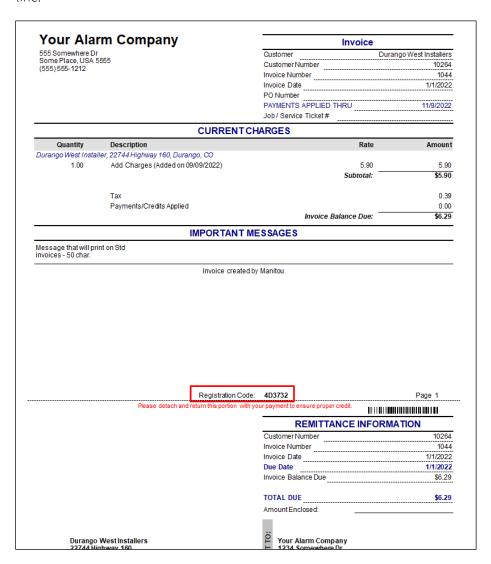
Registration Code to be Added to Invoice Templates

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:

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

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
System Errors - Application/Workstation Errors when all branches and warehouses are checked Resolved an issue with the parameter "@branches" by changing varchar(8000) to varchar(max).
Missing Vendor Invoice Date 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.
Vendor PO Received Cost Defect 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.

Accounts Receivable

Resolved Issues
Decrease recurring rate for Site RMR does not decrease 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.
Items disappear from Payment Processing window Resolved a display issue that occurred when clicking column headings after automatically applying an amount to open invoices.
Customer Activity Ledger does not match balance due Resolved an issue with the customer activity ledger not matching the balance due by fixing the stored procedure Customer_Ledger.

Resolved Issues

Print Invoices duplicates each record 7-8 times!

Resolved this issue so that when printing invoices duplicates are not printed.

SedonaEmail Advanced Bridgestone Form Printing Incorrectly

Resolved this issue by changing the Invoice Bridgestone Advanced.html template to correct the order for address.

Changes for Manitou Dealer Billing Post

Two changes made for this integration:
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.

This requires updates to SedonaCloud (1.43.0) and Manitou (2.1.36).

Allow Edit of Cycle Invoices

Resolved this issue by allowing users to edit cycle invoices unless the invoice has been sent to the customer.

Client Management

Resolved Issues

Error when editing billing information to add email address

Resolved this error by updating the primary email field on customer billing information when adding or updating the primary email in the list.

Search Filter is not retained when navigating from certain fields

Resolved an issue with the Search Filter so that it now retains its settings.

Error Attempting to finish cancelling customer in cancellation queue

Resolved an issue causing an error when finishing the cancellation for a customer in the cancellation queue.

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