**SedonaOffice**® The #1 Financial Software for Security Companies

# SedonaFSU iOS Release Notice

Version 2.4.5



09/21/2016

**PERENNIAL SOFTWARE** Makers of SedonaOffice and AlarmBiller

# Contents

Enhancements	3
Setup	3
Download Later	
Download Frequency Switch	
Download Item Detail	4
Schedule	5
View Closed Tickets	5
Review Tab	5
Inactivate Contacts	5
Appointment Tab	6
Resolution Button	6
Notes Tab	6
View Hyperlinks	6
Parts Tab	6
Edit Description	6
Other Tab	7
Negative Items	7
History Tab	7
Date Order	7
Documents	8
Inspection Documents	8
Behind the Scenes Functionality	14
Communications and Memory	14
Batch Mode	
Automatic Online/Offline	14
Application Corrections	15
Technician Management Tool	
Technician Drop Down	
Technician Pictures	
iOS App	
Connection Loses	
Floating Panels	
Recurring Misc. Appointments	
Load Every _ Days	
Serialized Parts	
Loading History	

# Enhancements

# Setup

# **Download Later**

If a startup item takes more than a few moments to load a 'Download Later' option appears. Select this option and the app will immediately stop loading that item and move to the next. If the load is stopped this way the app may not have all the information it needs, but it can still gather that info in real time as you need it. Remember that gathering info in real time may cause a small performance penalty as the app must go find the data that was skipped in the download.

	Login Successful.
Sec.	Loading Setup Data
	Download Later
	Initializing Parts

## **Download Frequency Switch**

The download frequency switch now automatically reverts to Every \_ days after each load. This is to prevent startup items from downloading every time the app refreshes. The switch can be manually set back to green. If it is manually set back the system will load that item on the next refresh and again auto revert the switch to Every \_ days.

< Back	Data Item Downloads			
Download Local Data				
General Setup	Every	1	day(s)	) (ì
Technician	Every	1	day(s)	) (i)
Taxes	Every	30	day(s)	) (j
Resolutions	Every	30	day(s)	) (i)
Panel Types	Every	30	day(s)	) (ì
Alarm Companies	Every	30	day(s)	) (ì
V Items	Every	30	day(s)	) (i)
Parts	Every	1	day(s)	) (j
Vser Defines	Every	30	day(s)	) (j

# Download Item Detail

A blue information icon now appears next to each startup item in Program Data Downloads:  $^{(1)}$ . If you select this it shows:

- 1. How many items there are to load and how many you have actually loaded
- 2. The last time that item was loaded
- 3. The Download Now option. This option allows you to re-load just that single item instead of the entire app. If selected a window will pop up and ask you to verify if you want to re-load the item. Select Yes and the load will begin.

<b>&lt;</b> Back	Data Item Dow	nloads		
Download Local Data				
General Setup			Required: 2712	(j)
Technician	Parts	2 Last Downlo	Actual: 2712 ad: 9/20/16, 1:54 PM	(j)
Taxes	C Down	nload Now 3		(j)
Resolutions	U Down			(i)
Panel Types				(j)
Alarm Companies				(j)
Items				(j)
Parts				(j)
User Defines				(j)
1:58 PM			☑ 58	% 🖬 🔿
🗸 Back	Data Item Dow	nloads		
Download Local Data				
General Setup		Every 1	day(s)	(1)
Technician		Every 1	day(s)	(j)
Taxes		Every 30	day(s)	(j)
Resolutions		Every 30	day(s)	(j)
Panel Types		Every 30	day(s)	(j)
A Download Confirm		Every 30	day(s)	(1)
Download service part	data?	Every 30	day(s)	(i)
Yes	No.	Every 1	day(s)	(i)
PL 105		LVCIY	udy(3)	0

# Schedule

# **View Closed Tickets**

There is a new permission in the Technician Management Tool that governs whether users can see closed tickets in their schedule. If this permission is checked users will see closed tickets and if it is not checked closed tickets will not show.



## **Review Tab**

## **Inactivate Contacts**

The '-' symbol in the contacts section used to delete contacts. This is no longer the case. This sign now inactivates contacts only. The Technician Management Tool permission for this has been relabeled from 'Delete Contacts' to 'Inactivate Contacts'.

Name	Title		
Miss Sara Parker	Homeowner		
		Inactivate c	onfirmation
		Are you sure you Miss Sar	want to inactiv a Parker?

# **Appointment Tab**

# **Resolution Button**

When resolving an appointment the resolution button has been changed from the word "Done" to the arrow symbol below.

Appoi	ntment Resolutio	on
•	Resolution	Resolves Ticket
	(j)	Billable Call Billable Call Billable
	⊉	

## Notes Tab

#### **View Hyperlinks**

To open hyperlinks within notes highlight the note, select edit, and then press and hold on the link. A window will pop up giving you the Open option.

Sa	ve	General	Internal
www.s	edonaoffice.com		
	www.sedonaoffice.com		
	Open		
	Add to Reading List		
	Сору		
	Share		

# Parts Tab

## **Edit Description**

The description on parts can now be edited. It can be edited both as the part is being added, and afterward.

MFG Code	Description	Qty	Price	Location
GI-CB875BK	edited description	1	0	Location
		MFG Code     Description       GI-CB875BK     edited description		

# Other Tab

# **Negative Items**

Negative items can now be entered on the Other tab, and will either show as negative on the Accept tab or reduce Other charges there.

Code	Description	Qty	Price	Total	Тах
CREDIT	CREDIT	1	-20	-\$20.00	
Parts	\$0.00				
Labor	\$0.00				
Other	-\$20.00				
Taxes	\$0.00				
Grand Total	-\$20.00				

# **History Tab**

## **Date Order**

Tickets on the history tab will now appear in reverse date order with the most recent on top.

# Documents

# **Inspection Documents**

A new feature has been added for inspection tickets only. If you add an inspection template to an inspection record in SedonaOffice, that template will auto populate onto the inspection ticket, and will in turn be visible on the FSU.

# Adding Inspection Templates

To add an inspection template first create the template in whatever format you need (.docx, .pdf, .excel, etc.) and save it to your machine. Then:

- 1. In SedonaOffice open an inspection record
- 2. Select the Reports Tab
- 3. Click on Manage...
- 4. Click New
- 5. Browse for your template document
- 6. Click Okay

ystem Inspection	Mayor, Ms Marguerite
Site	26 N Woods Rd
System	1320 Burglar Alarm
Detail   Equipment Date	Inspection Items Reports Service Ticket Description User
	S Inspection Report Templates
	Code Description
	word test.docx word test.docx
Templates	Template Code word test.docx
Code	Description word test.docx
	Add Delete
	3
	Add Remove Manage

- 7. Still on the Reports Tab, click Add...
- 8. Select your document
- 9. Click Add in the smaller window
- 10. Click Okay

Site	Mayor, Ms Marguerite 26 N Woods Rd					
System	1320 Burglar Alarm					
	nspection Items Reports				User	1
Date	ervice licket   Description	1			User	
	3 Add Report 1	femplate to Inspecti	on		×	<
	Code 8		Description			
	word test.docx		word test.docx			
	<				>	>
Fomolation	< Template Code	word test.docx			>	> -
[emplates Code		word test.docx			>	>   
	Template Code		10 <u>Q</u> K	Apply	Cancel	•     
Templates Code	Template Code		10 <u>QK</u> 9 <u>A</u> dd			<pre>&gt; </pre>
	Template Code		<u></u>		<u>C</u> ancel	•     
	Template Code		<u></u>		<u>C</u> ancel	•   
	Template Code		<u></u>		<u>C</u> ancel	
	Template Code		<u></u>		<u>C</u> ancel Delete	<u>Remove</u> <u>Manage</u>

# SedonaOffice<sup>®</sup>

The top portion of the Reports Tab is the Reports section, the bottom portion is the Templates section. Once your template is added it will appear in the Templates section.

Site	Mayor, Ms 26 N Woo	Marguerite ds Rd
System	1320 Burglar Ala	arm
Detail Equipment	Inspection Items	Reports
Date	Service Ticket	Description
Rep	ports Section	
Templates	ports Section	
	ports Section	Description word test.doc

At this point you can create the inspection ticket as normal and the inspection template will auto attach to the ticket as an Inspection Report.

#### **Viewing Inspection Reports**

Once the inspection ticket is created click on the documents tab of the ticket. The inspection report will show in the new "Inspection Reports" section.

B	<b>3</b> ) =						Ti	icket #262	12							×
	Ticket															
Service	Custom	Appointm		\$ Billing	Documents a		ipment	Journal	Notes	<b>Other</b>	Purch	ase	E Service	Jicket	J) Ticket	
Ticket	Fields	and Lab	or		Reports (1		d Parts Go To		(0)	Items	Orders	(0)	History	Log	Group	Notificat
Customer Site	Mayor, Mayor, 26 N W	Ms Marguer Ms Marguer oods Rd e NJ 07712			Created Created Status		-	38 AM		Cont Phor Notif	ne [	1			_ Ext _	
							Docu	ments								
File			Descrip	ption	Тур	e		L	evel			User			Uploaded	
		Description					Inspectio	n Reports user						Uploa	rded	
• word te	est.docx	Description	1		Jes	slynnL		user			09	/21/2	016	Uploa	ided	

If you return to the inspection record you will see your template is now also listed in the top Reports section, which indicates it has been added to your ticket.

Site	Mayor, M	s Marguerite ods Rd	
System	26 N Woo 1320 Burglar A		
etail   Equipment	Inspection Items		
Date	Service Ticket	Description	User
0/21/2016	26212	word test.docx	JesslynnL
Templates			
Templates		Description	
Templates Code word test.docx		Description word test.docx	
Code			Add

# SedonaOffice<sup>®</sup>

On the FSU the Inspection Report can be viewed in documents under the new Inspection section.

Documents		Inspection: Inspection
Service Ticket: 26212	0	On Disk 11.11 KB
Site: (7503) Mayor, Ms Margueri	ite 🔘	Type Inspection
	1.000	Description word test.docx
System: 1320 Burglar Alarm		Docx
Jobs: Mayor, Ms Marguerite		
Inspection: Inspection	Ō	word test.docx
By: JesslynnL Uploaded: 9/21/	50 C	By JesslynnL
word test.docx word test.docx	>	Uploaded 9/21/16
		Downloaded 9/21/16

## **Working with Inspection Reports**

The Inspection Report can be downloaded and edited just like any other document.

When you upload a document to the FSU you will be given the option to upload it as a normal document or as an inspection report. To upload the new document as an inspection report:

- 1. Set the radio button to Inspection
- 2. Select the ticket the document is for
- 3. Select Upload



	Cancel	Upload Document	Upload
	Type: Inspection		0
	File: word test-1		DOCX
3	Desc: test		
	O Service Ticket		🔵 Job
	Inspection		
	26212: Mayor, N	Is Marguerite	10:15 AM
	26 N Woods Rd,		Scheduled

After an Inspection Report has been uploaded via the FSU it will appear on the FSU in the Inspection section. It will also appear in SedonaOffice on the service ticket under Documents - Inspection Reports. Finally it will appear in the inspection record under the Reports tab in the Reports section.

When a new ticket is created for that inspection the documents in the Reports section will *not* automatically be attached to the new ticket. Only documents in the Template section auto populate onto new inspection tickets.

Site	26 N Woo	1s Marguerite ods Rd	
System	1320 Burglar A	Jarm	
etail   Equipmen	Inspection Items	Reports	
Date	Service Ticket	Description	User
9/21/2016 9/21/2016	26212 26212	word test.docx testing 2	JesslynnL CCooper
9/21/2016	26212	test	CCooper
9/21/2016	26212	test	CCooper
9/21/2016	26213	word test.docx	JesslynnL
			ts for this
<u>r</u> emplates		inspection	ion record
Code		Description	
Code		Description word test.docx	
Code	Only doc	Description word test.docx cuments in	
Code	Only doo this Tem	Description word test.docx cuments in uplates	
Code	Only doo this Tem section v	Description word test.docx cuments in uplates will auto	
Code	Only doo this Tem	Description word test.docx cuments in uplates will auto e onto	
Code	Only doo this Tem section v populate	Description word test.docx cuments in uplates will auto e onto	
Code	Only doc this Tem section v populate new insp	Description word test.docx cuments in uplates will auto e onto	
Code	Only doc this Tem section v populate new insp	Description word test.docx cuments in uplates will auto e onto	
and the state of t	Only doc this Tem section v populate new insp	Description word test.docx cuments in uplates will auto e onto	

# **Behind the Scenes Functionality**

# **Communications and Memory**

The processes of communications and memory have been rewritten to improve performance.

# Batch Mode

Batch mode data submission to the server has been added.

# **Automatic Online/Offline**

The automatic online/offline feature is not an 'Offline Mode'. Though it is a step toward that goal. This feature works behind the scenes without user input. The app can determine whether it should work online communicating directly with the server, or offline using lists downloaded to a local database.

# **Application Corrections**

# **Technician Management Tool**

# **Technician Drop Down**

Users reported selecting a second technician from the drop down would result in no further data being saved. This has been corrected.

# **Technician Pictures**

Users reported not being able to add technician pictures. This has been corrected.

# iOS App

## **Connection Loses**

Users reported connection losses, which in turn caused data loss. How frequently the app needs to communicate with the server has been reduced, which should in turn reduce connection losses.

# **Floating Panels**

Users reported that while scrolling, panels would float up and obscure data, the frequency of this has been reduced.

# **Recurring Misc. Appointments**

Users reported these did not show on the iCalendar. This has been corrected.

## Load Every \_ Days

Users reported entering a 0 in this field cause the field to freeze up and not allow editing. The system will no longer allow a 0 to be entered.

## **Serialized Parts**

Users reported not being able to select the serial number for serialized parts. This has been corrected.

## Loading History

Users reported history would only load for the first customer selected. This has been corrected.