SedonaOffice®
The #1 Financial Software for Security Companies

SedonaFSU iOS Release Notice
Version 2.4.5

09/21/2016

Contents

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.
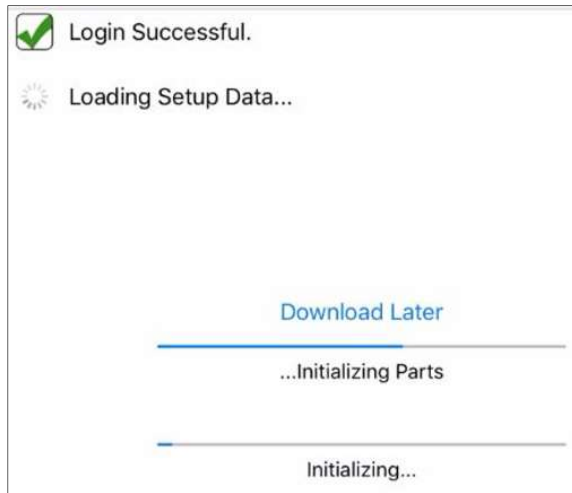

Download Frequency Switch

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.
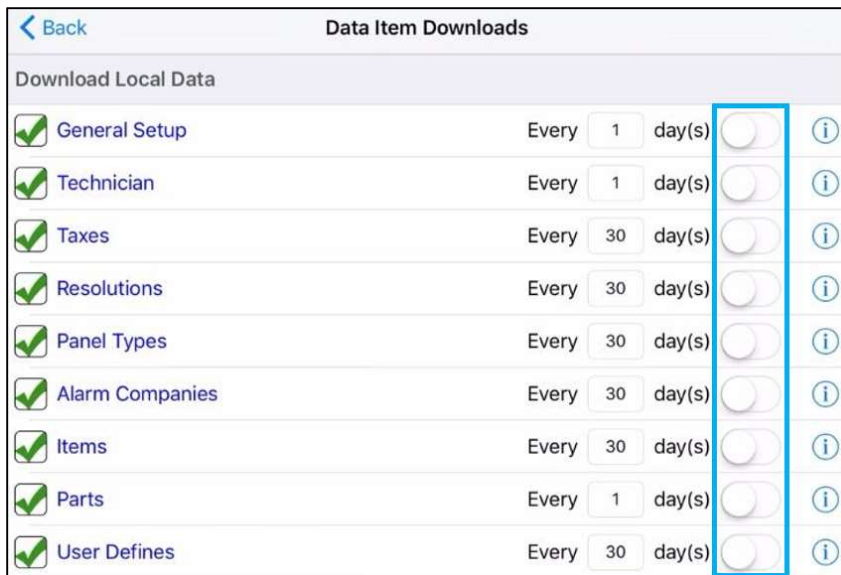
Download Item Detail

A blue information icon now appears next to each startup item in Program Data Downloads: ⓘ .
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.
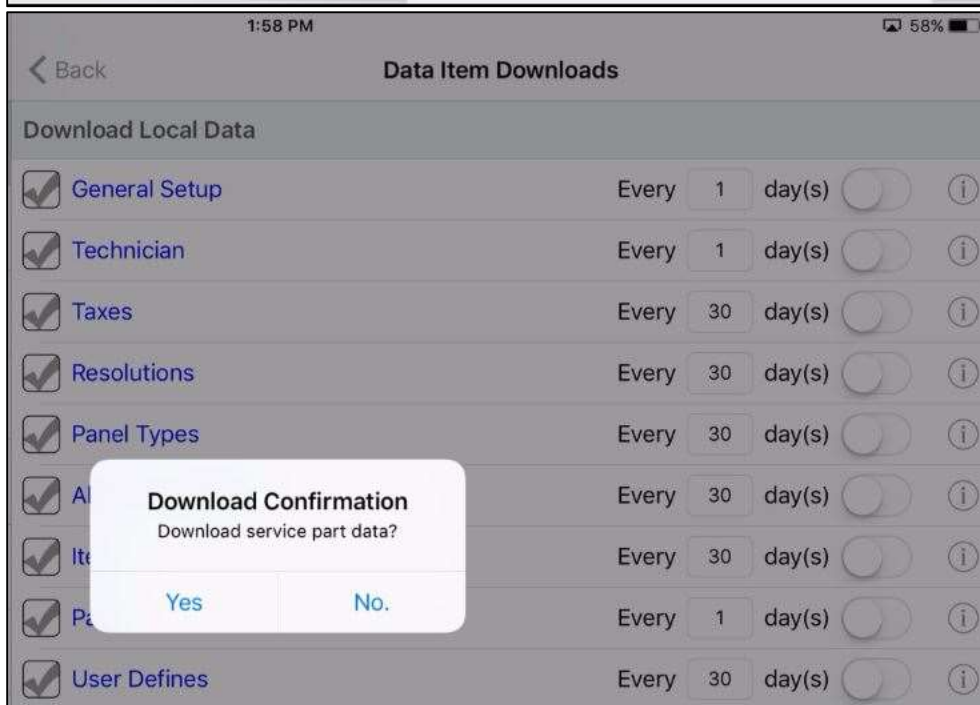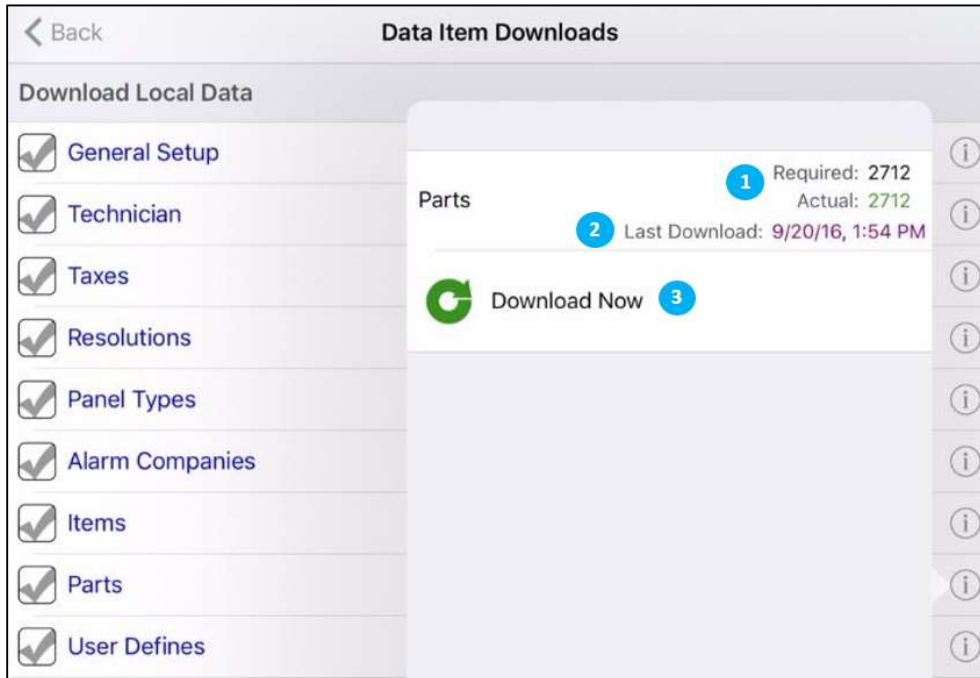
Schedule

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'.

Appointment Tab

Resolution Button

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

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.
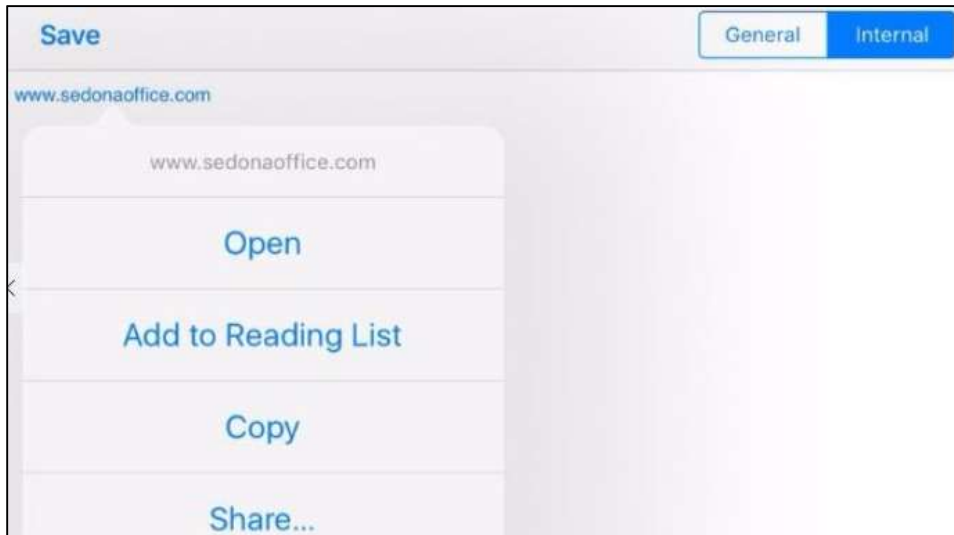
Parts Tab

Edit Description

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

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	Tax
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
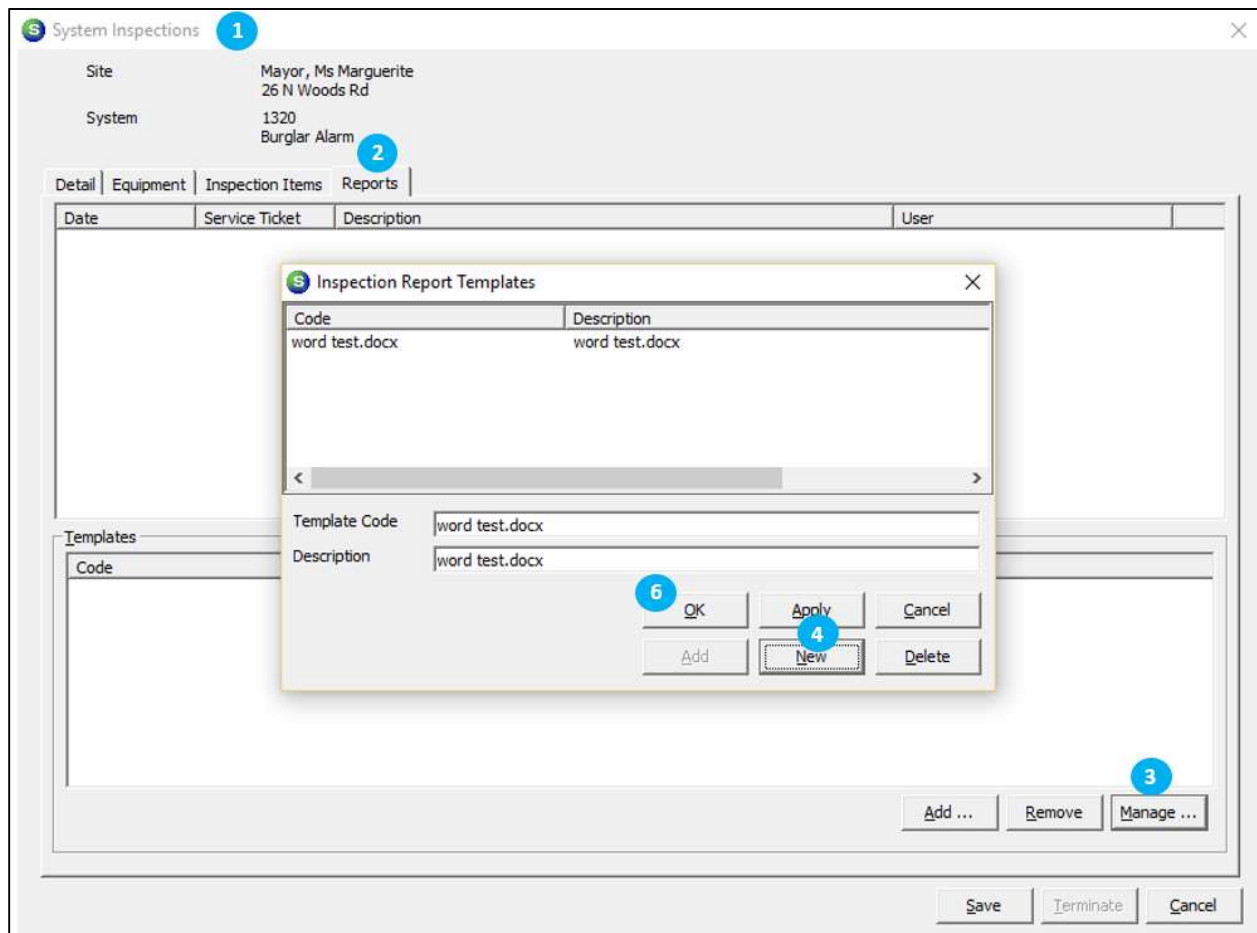
7. Still on the Reports Tab, click Add…
8. Select your document
9. Click Add in the smaller window
10. Click Okay
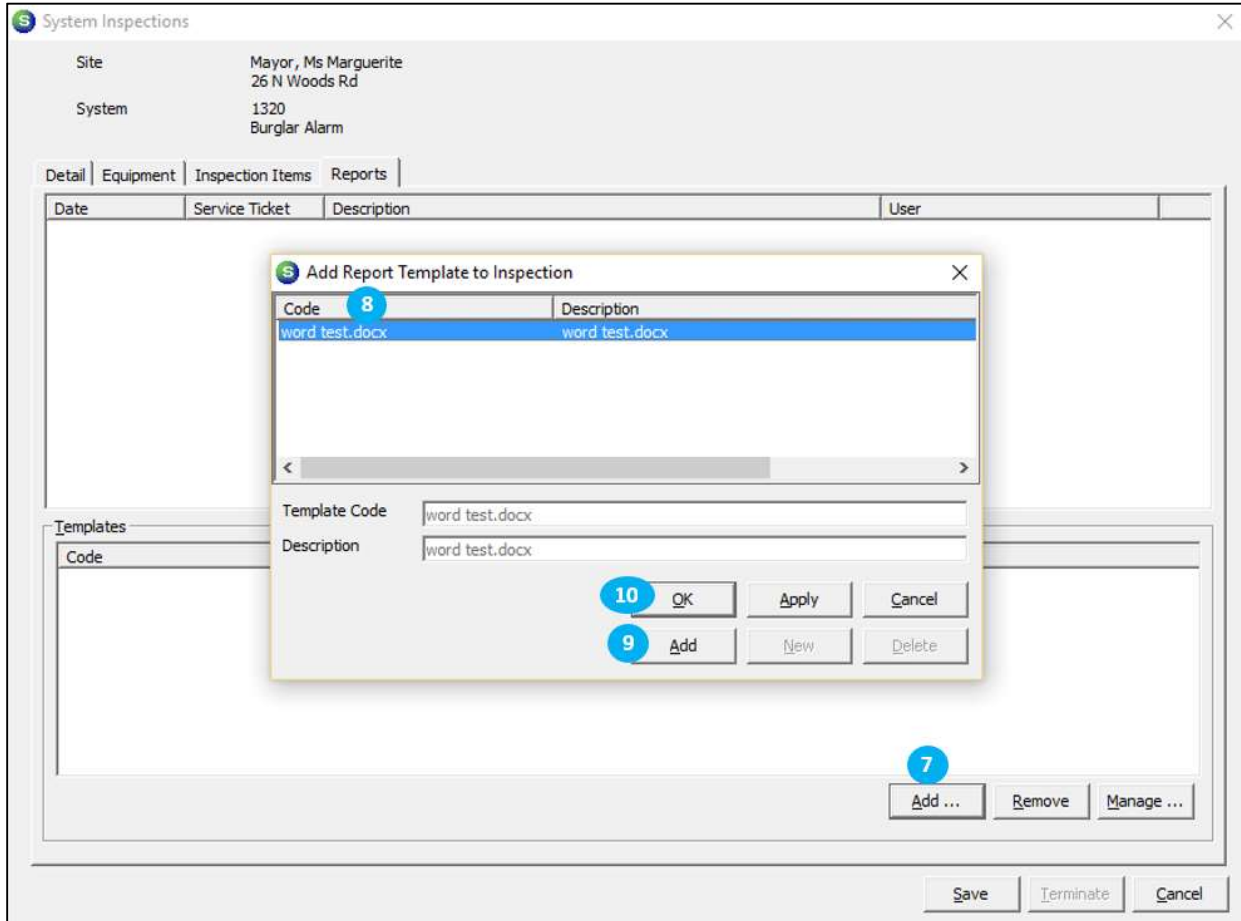
The top portion of the Reports Tab is the Reports section, the bottom portion is the Templates section. Once your template is added it will appear in the Templates section.
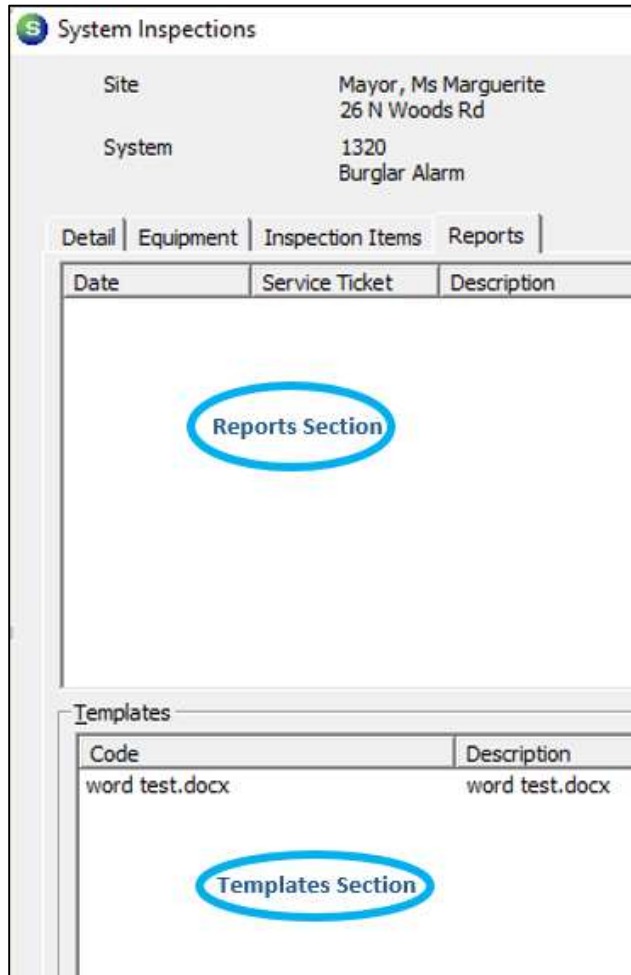
At this point you can create the inspection ticket as normal and the inspection template will auto attach to the ticket as an Inspection Report.

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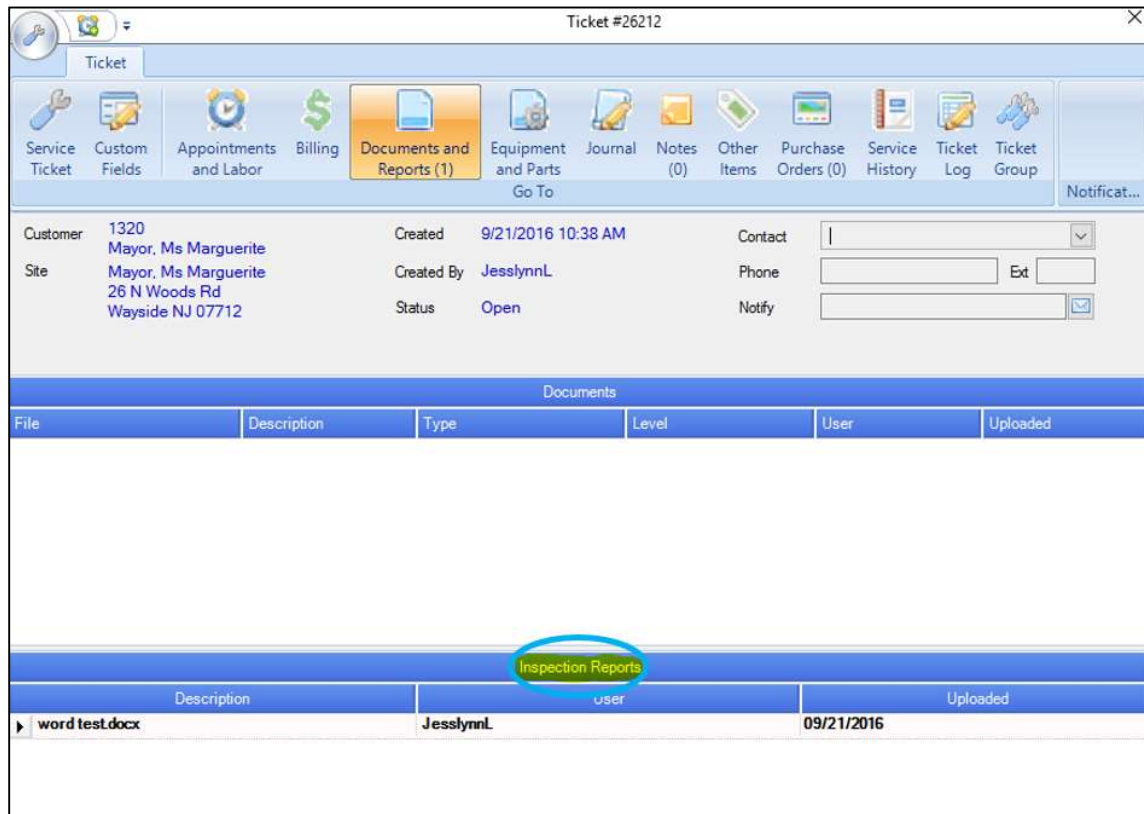Once the inspection ticket is created click on the documents tab of the ticket. The inspection report will show in the new "Inspection Reports" section.

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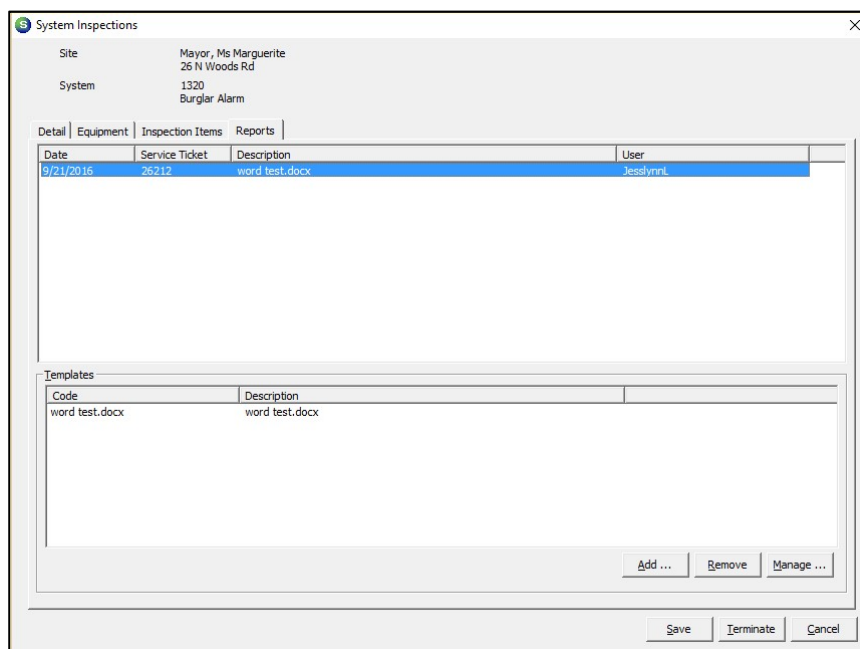
On the FSU the Inspection Report can be viewed in documents under the new Inspection section.

Working with Inspection Reports

The Inspection Report can be downloaded and edited just like any other document.
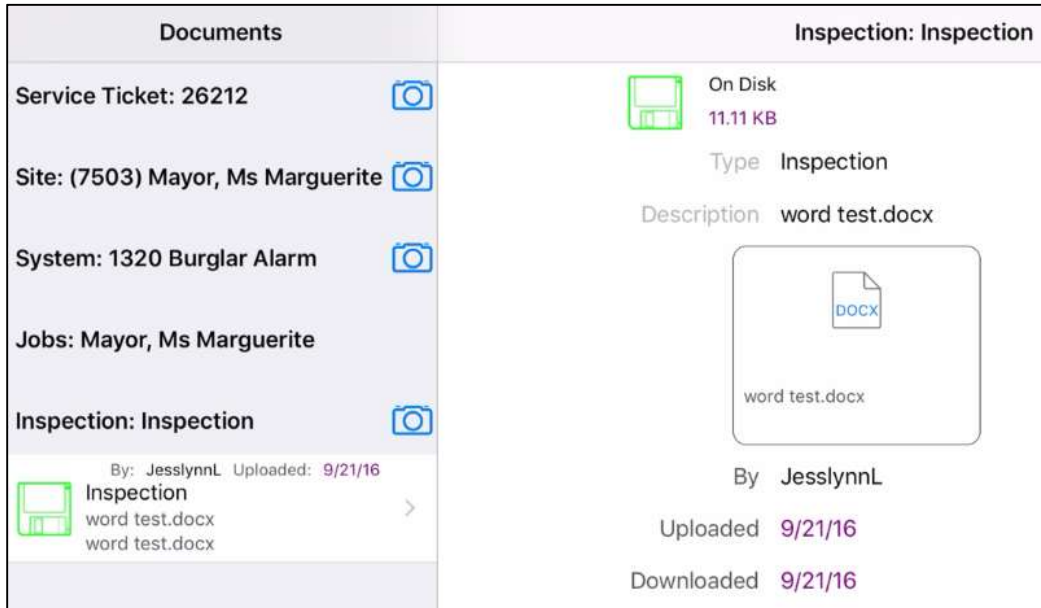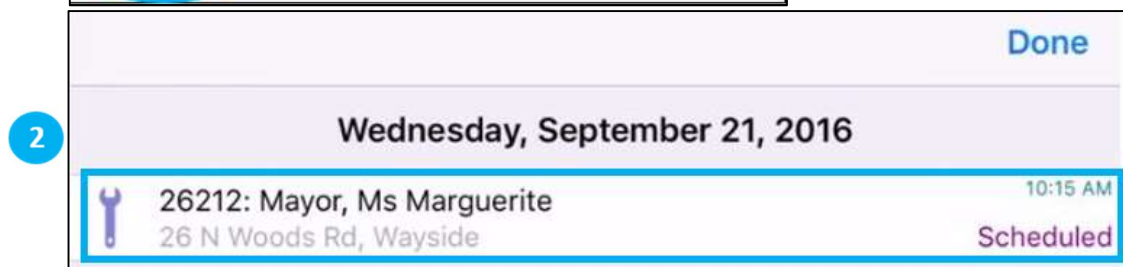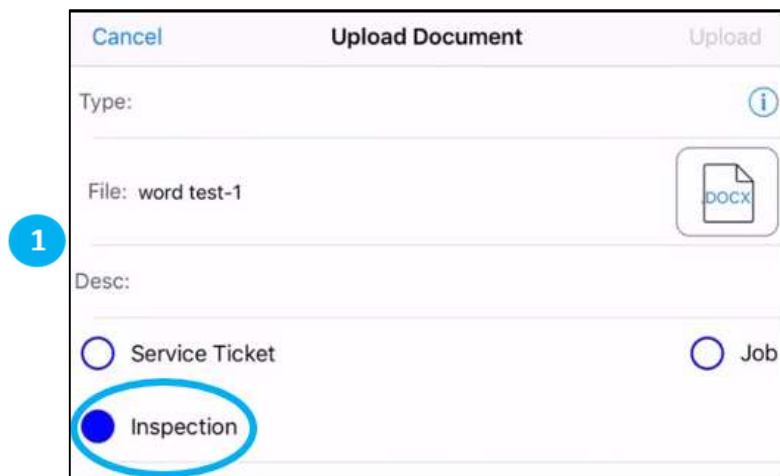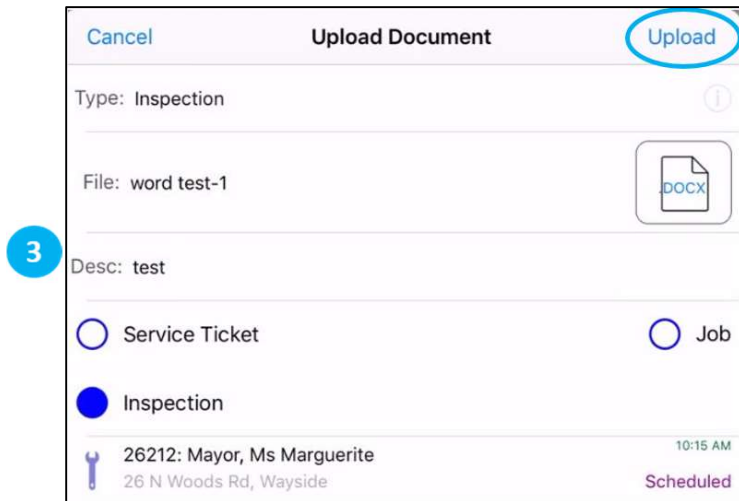
When you upload a document to the FSU you will be given the option to upload it as a normal document or as an inspection report. To upload the new document as an inspection report:

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

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.
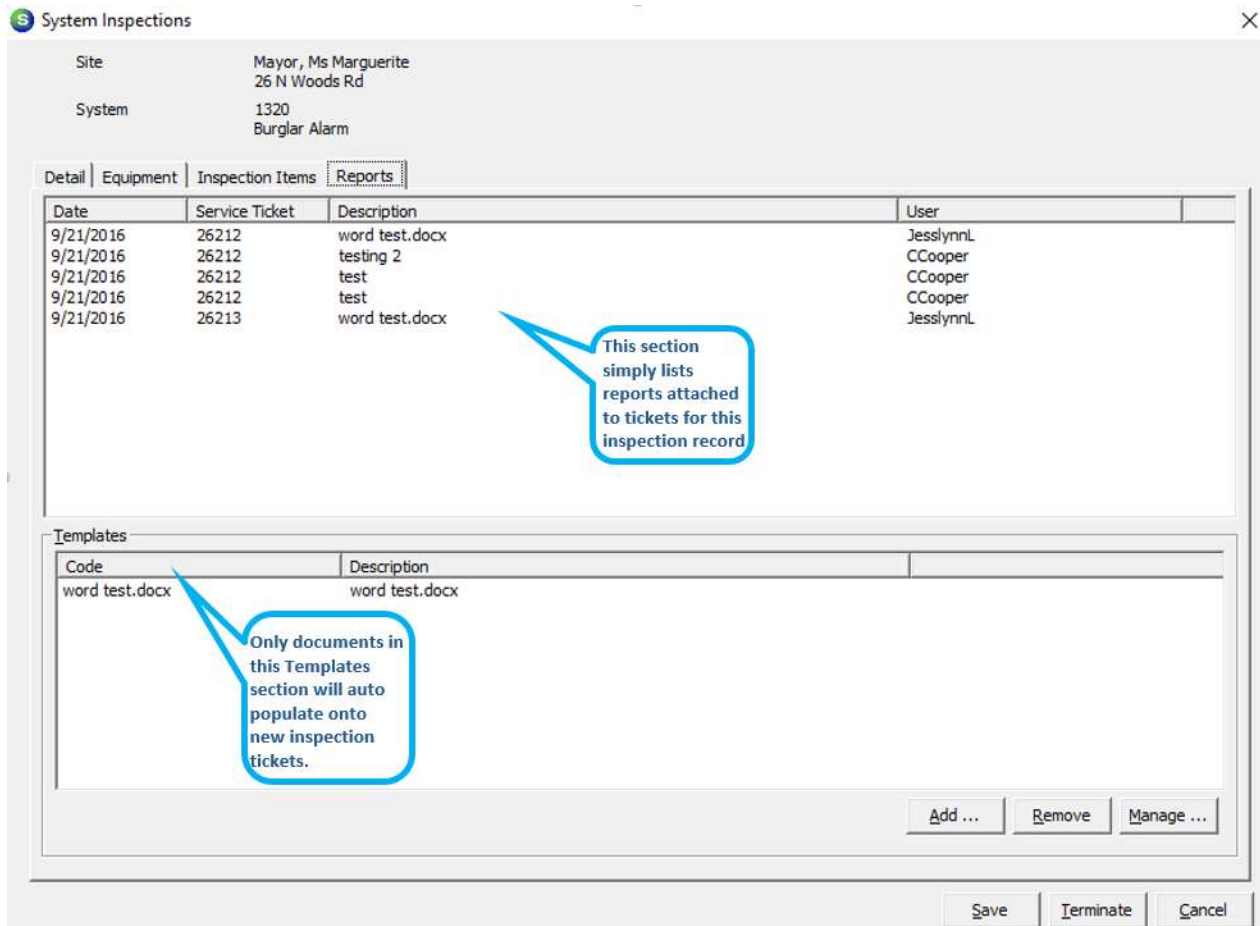
Behind the Scenes Functionality

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.