

SedonaOffice Release Notice

SedonaOffice

Version 5.6.219

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SedonaOffice

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About this Document

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Overview

This document is being provided to explain enhancements, changes and application corrections made to the SedonaOffice application since the last released Version 5.6.215.



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Application Enhancements/Improvements

Accounts Receivable

EFT Processing with multiple Merchant ID's

New functionality has been incorporated into the EFT Processing effective with the release of SedonaOffice version 5.6.219. This new functionality will better manage EFT Batches for companies using more than one Merchant ID.

Merchant ID's are now linked to a Branch within SedonaSetup. A new field has been added to the Branch Setup form where you will select the Merchant ID number that will be used when processing EFT transactions for customers within a given Branch.



- For SedonaOffice customers using more than one Merchant ID, make certain to submit pending transactions before you update to 5.6.219.
- After updating to 5.6.219, you <u>must</u> link your Branch records to the appropriate Merchant ID before submitting any new batches for funding.

📰 Branch Edit -			□ In <u>a</u> ctive
Branch	MI	Invoice Address 1	•
D <u>e</u> scription	Michigan	- SedonaSecurity 44789 Joy Road	
GL Code	10	- Canton, MI 48188	I
Merchant Id	314132		
		<u>A</u> pply <u>N</u> ew	Delete

EFT Processing Form

A new field, Merchant Id, has been added to the EFT Processing form. The Merchant ID shown will be the Merchant ID that is linked to the Customer's Branch.

🖁 Batch Informati											
	ion				🔍 View	Information					
Batch Co	de ** Not Submitted **					Hold Date	7/15	2014			
Total Co	unt [1					Branch	1				
Total Am	ount \$25.00	Auto	Non Re	ecur	Submitted Tra	ansactions	e c	Batch Live (0)			1
					<u>N</u> on-Subr Transac	mitted tions	e c	Credi <u>t</u> Cards ACH (0)	s (1)		
Customer #	Name	Amount	Type	Invoice	Funded	Response	Posted	Bank/CC	Account	Merchant Id	
11076	Detroit Dept of Education	8405.36	Ι	208153	N		N	VISA	****7985	314132	
121	Davis, Roger	69.28	I	211153	N		N	VISA	****1685	314132	
12864	Conway, Jordan	40.13	Ι	211227	N		N	VISA	****6516	314132	
230	Peter Strachan	13.37	I	220964	N		N	VISA	****6516	314132	
230	Peter Strachan	60.30	Ι	220963	N		N	VISA	****6516	314132	
23941	Williams, Jordan	38.86	Ι	203100	N		N	VISA	****3678	541145	
23941	Williams, Jordan	38.95	I	212368	N		N	VISA	****3678	541145	
5989	Spencer, Evan	80.65	Ι	220959	N		N	AMER	****7455	541145	
										\square	

Client Management

EFT Setup

A new field has been added to the EFT setup form for both Credit Cards and Customer Banks. This new field, *"Days Past Inv [Invoice] Date"*, allows you to specify how many days after the Invoice Date, the EFT transaction will be available for processing. This new field overrides the current Hold Day field on the EFT setup.

A negative value may be entered into the *Days Past Inv Date* field; this would be done if you have dated your cycle invoices with a future date and want to process the EFT transactions immediately.

This new field is optional; if you leave this field set to the default value of 0, EFT's will continue to process as they did prior to the introduction of this new option.

If you would like to use this new field and would like to set all EFT records to the same value, please open a ticket on SedonaWeb, or contact support@sedonaoffice.com to request assistance.

🔄 EFT Setup 23941 W	'illiams, Jordan		×
Lustomer Number: 2394 Williams, Jordan 14 Beverly Way Plymouth, MI 48170 (734) 826-0902	1		
Sustomer Banks Banks On File	_	Credit Cards	VISA
<u>B</u> ank Na <u>m</u> e on Account * (Not Business Name)		<u>N</u> ame on Card * <u>T</u> ype	Jordan P Williams
<u>A</u> ccount Number*	Checking Cavings	Card Number * Expiration * Bill Street Address Bill Postal Code	***** 3678 Edit 12 14 14 Beverly Way 48170 14
Payment Method Auto Processing Hold Day Days Past Inv Date	Recurring Non-Recurring	Payment Method Auto Processing Hold Day Days Past Inv Date	Visa
	<u>Apply</u> <u>D</u> elete	Print Cycle Invoi	ces Apply Delete
New Transaction			Close



Client Management (continued)

EFT Setup (continued)

Functionality

When entering a value in the *Days Past Inv Date* field, the application will add this number of days to the Invoice Date. This will populate the Hold Date field for the cycle invoice. For example, the Cycle Invoices are posted and dated 06/06/2014, and the EFT setup Days Past Inv Date field is set to 30. The EFT Hold date will be set to 07/06/2014, which is 30 days from 06/06/2014.



Client Management (continued)

Next Customer/Previous Customer

Two new buttons have been added to the main application button toolbar which when clicked, will advance to the next customer number or the previous customer number. The new feature is only available if your customer numbers contain only numeric characters.





Client Management (continued)

Customer Part Pricing Level

A new field, *Part Pricing Level*, has been added to the Customer *Setup Information* form. When clicking on the drop-down arrow in this field, six options are available: None, Level 1, Level 2, Level 3, Level 4 and Level 5. These Price Levels are linked to a new *Part Price Level* setup located on the Part setup form. Five different Part Price Levels may be setup for individual Parts. Please refer to the Part Pricing Levels topic under the Inventory section of the release notice for more information on how to setup the Part Price Levels.

If a Part Pricing Level is assigned to the Customer, this will affect the calculated price to the customer for all invoices where a part is a line item on the invoice including Jobs (if the Job Type allows for billing parts individually), Service Tickets, Inspection Tickets and Miscellaneous Invoices.

The Customer Part Pricing Level will override any other business rules setup on the Service Level assigned to Tickets.

S Customer Setup 221	1					×
Ustomer # 22	21	Price, Pamela 1 Price Lane				<u> </u>
	amela Price	Plymouth, MI	48170			
<u>A</u> dditional Name		1				T
Setup Information Cu	ist Addt'l Information Bill To Ma	ster Account Setup	Items	Alternate Part	Descriptions	5
C <u>u</u> stomer Status	ANR	Blanket <u>P</u> .O.				
Customer Type	Residential	P.O. Expire Date				
Old Customer <u>I</u> D		Customer Since	5/29/20)14		
<u>T</u> erms	Due On Receipt	C <u>h</u> ain Account			•	
Tax <u>E</u> xempt #		Customer <u>G</u> roup			•	
OK to Increase		Customer Group 2			•	
Salesperson	Oliver.Blais 💽 🔥	Branch	MI		-	
	and the second	No Collections	Г			
		Part Pricing Level	Level 1	l		
Master Account Inform	nation I	nvoice Printing	Ν	Name		~
	Is Master Account	Print Cycle Invo	oices 🛽 🗠	lone evel 1	_	
<u>M</u> aster Acct	•	Print Statement	.s In Invoi L	evel 2		
		Separate Cycle	Invoice	evel 3		
	Sub Account Invoices to	🔽 Charge Late Fe	es L	evel 4 evel 5		
Critical Message	Master A/R		E			
Expires On						
				<u>S</u> ave	⊆lose	



Customer Part Pricing Level (continued)

Customer Default Part Price List

A new option has been added to SedonaSetup *CM Data Entry Defaults*, which will allow you to specify the default *Part Pricing Level* that will be used when creating new customers. You may select one of the five Part Pricing Levels or set to the option of None.

Sedona Office Setup (SedonaSecurit: File Find Find Next View Tools Help	у)							_
Sedona Setup	Sedona Setup							
Description	Area							
Setup Processing	AR							
Statement Rules	AR							
Tax Groups	AR		😡 Data Entry Defaults			🤹 Cycle Billin	g Defaults	
Tax Tables	AR							
Terms	AR							
Cancellation Profiles	CM		Branch	MI	-	Monthly	C Quartark	,
Cancellation Tasks	CM		Dianch	Tow	<u> </u>	- Montany	- Quaiterin	, ,
Chain Accounts	CM			MT Harris Courts		🔿 Semi-Al	nnual 🤇 Annual	
Collection Statuses	CM		Tax Group	I MI-wayne County	<u> </u>			
Custom Fields Setup(Customer)	CM		_			Category	Monitoring	~
Custom Fields Setup(Site)	CM		lerm	Due On Receipt	-	Invoice Des	sc Recurring	-
Custom Fields Setup(System)	CM		Custom				, -	
Custom Fields Table1 (Customer)	CM		System	Intrusion	•	🦄 Job Dillion I	Defeuite	
Custom Fields Table1 (Site)	CM					- Job Billing i	Deraulis	
Custom Fields Table1 (System)	CM		Contract Form	3 Year	•	Category	Jobs Com	-
Custom Fields Table2 (Customer)	CM					outugor y	1 5655 Com	
Custom Fields Table2 (Site)	CM		Country	United States	-	Invoice Des	SC Installation Services	•
Custom Fields Table2 (System)	CM		í í			RMR Reaso	on New RMR	-
Custom Fields Table3 (Customer)	CM		Area Code				,	
Custom Fields Table3 (Site)	CM							
Custom Fields Table3 (System)	CM		Customer Type	Residential	-			
Eustomer Groups	CM							
Data Entry Defaults	СМ			Residential	Commercia	al		
Payment Methods	CM	-		F				
RMR Escalations	CM		Part Pricing Level	Level 1				
RMR Reasons	CM							
System Types	CM							
Type Of Customer	CM							
Alarm Services	CS							



Client Management (continued)

Alternate Part Descriptions

A new option, *Alternate Part Descriptions*, has been add to the Customer Setup. When printing a customer invoice where a part on the invoice is contained in the list of the Customer's Alternate Part Descriptions, the description printed on the invoice will use the description saved in the Customer's Alternate Part Description list. Currently this option is only available on one particular custom invoice form.

🔄 Customer Setup 2	221						×
Ustomer # Customer <u>N</u> ame Additional Name	221 Pamela Pric	e		Price, Parr 1 Price La Plymouth,	nela ne MI 48170		4
Setup Information	Cust Addt'l	Information	Bill To Master	Account Setur	Item:	Alternate Pa	rt Descriptions
Part Code 1240 PN001 PN002 PN003		Alt. Code 12V408 001P 202PN 8003P		Alt. Descriptio 12V 4AH BATT Motion Detect Glassbreak De Door Contact	n TERY tor stector		
Edit Alternate Co Alt. Desc <u>ri</u> ptio	de on				Ap	ply <u>N</u> ew	v <u>D</u> elete



Inventory

Part Pricing Levels

A new feature, *Part Pricing Levels*, is being introduced as of version 5.6.219. This will allow you to setup up to 5 Part Price Levels for each Part Number. Once the Part Price Levels have been created, if a Price Level is assigned to a Customer on the Customer Setup Information form, parts used on Jobs and Service Tickets will default to the Part Prices (if any) for that Price Level.

On the Part setup form, to the right of the *Sales Price* and *Service Price 1* fields is a new icon service in the sales Price or Service Price will open the *Part Pricing Levels* form to enter the information for up to five unique Part Price Levels.

🖻 Part Edit			×
Part PN001			🔲 Inactive
्रिंP <u>a</u> rt Det	ail 🛛 🛒 Vendors 🗎	📸 Alt. Parts 📔 🔜 Warehouses 📔 🔤 Custom Fields 📗	Documents (0)
Description	n		
	Description	Motion Detector	Part <u>K</u> it
	Detail	PN001 PIR Motion 60lb	🔲 Special Order
	Product Line	Motion Detectors	Customer Equipment
	<u>M</u> anufacturer	Bosch 💌 🛨	
	Man <u>u</u> f Part Code	PN001	🔽 Stock Item For Jobs
	Manuf <u>W</u> arranty	No Warranty	
	<u>U</u> .P.C		🔲 Ereeze All Purchasing
	Notes		Labor Data
Costing		1	
costing	Method	Standard	
	PPV Account	120900	
	Direct <u>E</u> xp Acct		
AR Setup			
	Invoice Item	SVC Part-TX	
Sales	Invoice Description	Mation Detector	
	Price		Available for Sales
Service	•		
	Invoice Description	Motion Detector	_
	Price 1	20.0000	I▼ Available to FSU
	Price 2	20.5000	
Labor <u>U</u> nits	5	Save	Copy <u>C</u> lose

Inventory (continued)

Part Price Levels (continued)

Each Part Price Level contains three possible elements; Price, Labor Units and Labor Rate. The Price field is considered the base price of the part. You may also use a Labor Factor in conjunction with the Price field to calculate the total Price of the part.

For example, if the base part price is \$21.00, the labor units value is set to 1 and the labor rate is set to \$21.00, the total calculated price for the part will be \$42.00.

Price + (labor units x labor rate) = total part price.

S Part Pricing I	.evels		×
Part Code PN001		Description Motion Detect	or
Manufacturer Bosch		Manufacturer Pa PN001	art Code
Level 1 Price Labor Units	21.0000	Labor Rate	21.0000
Level 2 Price	22.0000		
Labor Units	1.0000	Labor Rate	22.0000
Price Labor Units	23.0000	Labor Rate	23.0000
Level 4 Price	24.0000		
Labor Units Level 5	1.0000	Labor Rate	24.0000
Price Labor Units	25.0000	Labor Rate	99.0000
		2	ave <u>C</u> lose

Inventory (continued)

Transfer Requests

A new feature, *Transfer Requests* is incorporated into SedonaOffice as of version 5.6.219. This new feature changes the functionality of the Bulk Transfers that were previously performed from the main application Inventory menu.

The new Transfer Request feature was designed primarily for transferring parts from one branch warehouse to another, and providing tracking dates as to when the parts were shipped and when the destination warehouse actually received the parts.

When selecting the Transfers option from the Inventory menu, the new Transfer Requests list will be displayed. Any transfers that have not been completely received will be listed. From the Transfer Requests list, a new Transfer Request may be created, and existing Transfer Requests may be received or modified prior to receiving. Closed Transfer Requests may be opened and viewed by clicking on the *Include Closed* button.

Any Transfers made prior to updating to 5.6.219 will be listed when selecting the *Include Closed* button.

Single part Transfers may still be performed from a Part Explorer record without having to use the Transfer Requests Inventory option.

🕒 Transfer Re	quests					
Date	From Warehouse	To Warehouse	Reference	Memo	Status	State
5/29/2014	Main-MI	M101	Job #376	For Job 376	Shipped	Open
6/6/2014	Main-MI	Main-OH		Inter-branch	Requested	Open
•						
				Include Closed <u>R</u> ecei	ve <u>N</u> ew	⊆lose

Inventory (continued)

Transfer Requests Functionality-Shipped Parts

To create a new Transfer Request, click on the *New* button located at the bottom of the Transfer Requests List. The Transfer Request form will be displayed.

- Select the *From Warehouse* and the *To Warehouse* from the drop-down lists
- Enter a <u>Memo</u> this field will allow up to 255 characters.
- Select the <u>Request Date</u>.
- The <u>In Process Date</u> would be selected when the parts are being pulled from stock. This may be entered at a later time. Once an In Process Date has been entered, the status of the Transfer Request will be changed to In Process.
- The <u>Shipped Date</u> would be selected when the parts have actually been shipped to the receiving warehouse. This may be entered at a later time. Once a Shipped Date has been entered, the status of the Transfer Request will be changed to Shipped.
- <u>For Job/Ticket</u> If the Parts are for a Job or Ticket, you may click on the drop-down arrow and select either Job or Service. If Job or Service is selected, in the Reference field, click on the lookup button to the right of the field to select the Job or Ticket number.
- In the lower area of the form, select the first part number and enter the quantity to be transferred. Click on the Add button. Continue until all parts needed have been added.
- When finished, click on the *Save* button located at the lower right of the form.

S Transfer Reque	st							×
📑 Warehouse Sele	ection	Part Code	Source Qty	Dest Qty	Req Qty	Serial Number	Lot Number	Cost Method
Erom Warehou	Jse Main-MI	1025-WP	180	0	20			Standard
<u>T</u> o Warehouse	Main-OH	IM1270 W54945	231 138	1 0	40 25			Standard Standard
<u>M</u> emo	Inter-branch							
<u>R</u> equest Date	6/6/2014							
<u>I</u> n Process Dat	:e 6/6/2014 🛄							
<u>S</u> hipped Date								
For Job/Ticket	None							
Reference	(20) 102							
	C Bring Quantity Up to Minimum C Bring Quantity Up to Maximum C Manual Iransfer							
ुंद्धे Part Selection —								
Part Code	7.25g							
Transfer <u>Q</u> uanti	ty 📃							
<u>S</u> erial Number								
Lot Number		•						
	<u>N</u> ew <u>A</u> dd				Delete	Save	<u>S</u> ave/Receive .	<u>C</u> lose

Inventory (continued)

Transfer Requests Functionality

When the parts arrived at the "To Warehouse", the User will highlight the Transfer from the Transfer Requests list then click on the *Receive* button.

🧟 Transfer R	equests						
Date	From Warehouse	To Warehouse	Reference	Memo	Status	State	
5/29/2014	Main-MI	M101	Job #376	For Job 376	Shipped	Open	
6/6/2014	Main-MI	Main-OH		Inter-branch	Requested	Open	
				Include Closed	Receive New		ose

The Receive Transfer Request form will be displayed. Enter the *Received On* date in the header area of the form. If all parts listed are being received, click on the *Save* button to complete and close out the Transfer. If not all parts are being received, enter the quantity being received in the Received Quantity column for each part.

🔕 Receive Transfer Requ	iest			×
📑 Transfer Request Info				
Requested 6/6/2014 by carolynj	From Wareho Main-MI	use	To Warehouse Main-OH	
In Process 6/6/2014 by carolynj	Shipped N/A		Status In Process	
Received On 6/8/2014	Received By			
ुँ। Received Quantity —				\frown
Part	Serial Number	Lot Number	Requested Qty	Received Qty
▶ 1025-WP			20	20
IM1270			40	40
WS4945			25	25
				Save Close

Inventory (continued)

Transfer Requests Functionality-Replenish Truck Stock

If you need to transfer multiple parts to a Technician/Installer warehouse, you may create a Transfer Request and Receive the Transfer immediately.

To create a new Transfer Request, click on the *New* button located at the bottom of the Transfer Requests List. The Transfer Request form will be displayed.

- Select the *From Warehouse* and the *To Warehouse* from the drop-down lists
- Enter a <u>Memo</u> this field will allow up to 255 characters.
- Select the <u>Request Date</u>.
- Set the *In Process Date* to date the parts are being given to the Technician/Installer.
- Set the *Shipped Date* to the same date as the In Process Date.
- In the lower area of the form, select the first part number and enter the quantity to be transferred. Click on the Add button. Continue until all parts needed have been added.
- When finished, click on the *Save/Receive* button located at the lower right of the form.

S Transfer Request							×
📑 Warehouse Selection	n	Part Code	Source Qty	Dest Qty	Reg Qty Serial Number	Lot Number	<u> </u>
Erom Warehouse	Main-MI	IM1270	226	4	5		Sta
<u>T</u> o Warehouse	M100	IM1240	103	U	5		Sta
Memo	Truck Stock						
<u>R</u> equest Date	6/10/2014						
In Process Date	6/10/2014						
Shipped Date	6/10/2014						
For Job/Ticket	None						
Reference	7.25g						
	 C Bring Quantity Up to Minimum C Bring Quantity Up to Maximum ✓ Manual Iransfer 						
िं Part Selection ———							
 Part Code	*						
Transfer Quantity							
<u>S</u> erial Number							
		•					Þ
	<u>N</u> ew			Delete	Save Save/Rei	ceive Clo:	se

Inventory (continued)

Transfer Requests Functionality-Replenish Truck Stock (continued)

The Receive Transfer Request form will be displayed; click on the Save button located at the lower right of the form. A confirmation message will be displayed; click on the Yes button to complete the transfer.

😫 Receive Transfer Requ	est				×
📑 Transfer Request Info –					
Requested 6/10/2014 by carolynj	From Warehou Main-MI	ise	To Warehouse M100		
In Process 6/10/2014 by carolynj	Shipped 6/10/2014 by	carolynj	Status Shipped		
Received On 6/10/2014	Received By				
👸 Received Quantity —					
Part	Serial Number	Lot Number	Requested Qty	Received Qty	
▶ IM1240			5	5	
IM1270			5	5	
				Save	⊆lose
	Receive Parts T	ransfer			





Inventory (continued)

Transfer Requests Functionality-Serialized Parts

For Transfer Requests that include one or more parts that are tracked using the Serial Number costing method, the process is very similar to the shipping of parts or the stocking of vehicles. When selecting a serialized part, a form will be displayed from which you will select the serial number to be transferred. The remainder of the process is the same.

S Transfer	Requests							_ 🗆 🗙
Date 6/9/2014	- STransfer Request	1 1	1	il.	<i>L</i>		×	
6/9/2014	拱 Warehouse Selection	I	Part Code	Source Qty	Dest Qty Req Qty	Serial Number Lot Nu	imber Co	
	<u>F</u> rom Warehouse	Main-MI	Serial Numbers	- 5N002				X
	<u>T</u> o Warehouse	M100			[
	Memo		6/10/2014	1000	1234		50.00	
	<u>R</u> equest Date	6/10/2014	6/10/2014	1000	1235 6541		50.00	
	In Process Date	6/10/2014	6/10/2014	1000	6547		50.00	
	Shipped Date	6/10/2014						
	For Job/Ticket	Service						
	Ticket Number	3182						
		Bring Quantity Up to Minimum Bring Quantity Up to Maximum Manual Iransfer	-					
	ुंद्धे Part Selection							
	Part Code	5N002						
	Transfer <u>Q</u> uantity	1						
	<u>S</u> erial Number							
			L					
		<u>N</u> ew <u>A</u> dd						
			-					
								·

Inventory (continued)

Part Explorer

Changes have been made to the Part Explorer to display information related to the new Transfer Requests feature. On the Part Tree within a Warehouse, two new options are listed; Transfers - Open and Transfers - Closed. All part transfers performed prior to updating to 5.6.219 will be listed in the Transfers – Closed area.

Two new fields have been added to the Warehouse information which is displayed in the upper right pane of the Part Explorer when highlighting a particular warehouse from the Part Tree. The two new fields are *Pending XTFR In* and *Pending XTFR Out*. Quantities will be listed in these new fields once an *In Process Date* has been entered on a Transfer Request.



Inventory (continued)

Warehouse Explorer

Changes have been made to the Warehouse Explorer to display information related to the new Transfer Requests feature. On the Warehouse Tree, two new options are listed; Transfers - Open and Transfers - Closed. All part transfers performed prior to updating to 5.6.219 will be listed in the Transfers – Closed area.

🕒 Main-MI									
Main-MI Parts Negative Parts Purchase Orders Purchase Price Variances Repair Orders Transfers - Open	Warehou Descript Account Branch (use M ion M Code 1 Code M	1ain-MI 1ain-Michi 120000 1I	gan					
Transfers - Closed	Date	From Whse	To Whse	Part Code	Description	Ouantity	Job/Ticket	Received Otv	Received By
	5/29/2014	Main-MI	M101	69	# 69 DOOR CORD	1	376	0	
	5/29/2014	Main-MI	M101	AXSM3011	AXIS M3011 MINI DO	1	376	0	
	6/6/2014	Main-MI	Main-OH	IM1270	12V 7AH BATTERY	40		0	
	6/6/2014	Main-MI	Main-OH	1025-WP	Wall Plate Blank - White	20		0	
	6/6/2014	Main-MI	Main-OH	WS4945	WLS DOOR WINDOW	25		0	
	l								
			_						
J	p								

🗧 Main-MI									
Main-MI Parts Parts Purchase Orders Purchase Price Variances Repair Orders Transfers - Open Transfers - Open	Warehou Descript Account Branch C	ise ion Code Code	Main-MI Main-Michigar 120000 MI	ו					
lournal	Date	From Whse	To Whse	Part Code	Description	Quantity	Job/Ticket	Received Qty	Received By
- Southan	6/7/2014	Main-MI	Main-OH	028741-32	6210 STRIKE	3		3	Administrator
	6/7/2014	Main-MI	Main-OH	02CCAMKT	COLOR CAMERA KIT F	2		0	Administrator
	6/7/2014	Main-MI	Main-OH	1332	9V TRANSFORMER	2		0	Administrator
	6/7/2014	Main-MI	Main-OH	VN02872185	6210 ELECTRIC DOOR	3		1	Administrator
	6/7/2014	Main-MI	Main-OH	02CCAMKT	COLOR CAMERA KIT F	2		2	Administrator
	6/7/2014	Main-MI	Main-OH	1332	9V TRANSFORMER	2		0	Administrator
	5/29/2014	Main-MI	Main-OH	1240	ULTRATECH 12V 4AH	5	350	5	Administrator
	5/28/2014	Main-MI	Main-OH	995	RECESS MOUNT PIR M	2		0	carolynj
	5/28/2014	Main-MI	Main-OH	HR1214W	12 VOLT 1.4AH BATTERY	3		0	carolynj
	5/28/2014	Main-MI	Main-OH	34026	3.5 LITHIUM BATTERY	7		7	carolynj
	5/2/2014	Main-MI	M100	1240	ULTRATECH 12V 4AH	1		1	Administrator
	5/2/2014	Main-MI	M100	N/A	N/A	3		3	Administrator
	3/24/2014	Main-MI	M100	IM1270	12V 7AH BATTERY	5		5	Administrator
	2/26/2014	Main-MI	M100	WG11035507	22/4 WIRE BURG 500	1		1	Administrator
	2/21/2014	Main-OH	Main-MI	WG11035506	22/4 WIRE BURG 500	1		1	Administrator
	2/21/2014	Main-MI	Main-OH	6160	ALPHA ENGLISH KEYPAD	1		1	Administrator
	2/21/2014	Main-MI	Main-OH	WG11035506	22/4 WIRE BURG 500	1		1	Administrator
	2/21/2014	Main-MI	Main-OH	WG11035506	22/4 WIRE BURG 500	499		499	Administrator
	1/20/2014	Main-MI	M100	AURORA	PET IMMUNE PIR	1		1	Administrator
	1/13/2014	Main-MI	MI-Cust Repair	IA-1000	IA-1000	1		1	Administrator
	9/30/2013	Main-MI	Obsolete-MI	WINWB200	WATER BUG WATER S	1		1	Administrator

Job Management

Job Task List-Schedule Date

Three new columns have been added to the Job Task List; *Scheduled, Last Tech,* and *Last Dispatch*. These new columns are designed to provide information as to when a particular Task is to be scheduled, and to display the name of the most recent Technician along with their Job Appointment Dispatch date and time.

The Scheduled Date that appears in the Job Task List is entered on the Job Task form. If a date is entered into the *Schedule Date* field on a Job Task, the Job will appear in a new "Upcoming Tasks [to be scheduled]" list with the SedonaSchedule Job Listing. Once the Job Appointment is created and the person scheduling the Job approves the Job Task within the Job record, the item will drop off of the To Be Scheduled List in SedonaSchedule.

🕒 Job - 381 (Par	nela Price)				
Job	Job	Customer 221	Site		
Sales Summary	Job Number 381 Job Type Intrusion-Res Job Status Parts System 221 Intrusion Labor Units 14.5 (0 Used)	Pamela Price Price, Pamela 1 Price Lane Plymouth, MI 48170	Pamela Price 1 Price Lane Plymouth, MI 48170		
Marili Oudan	Tasks				
Job System Approvals	# Phase Task 1 Prewire Order Parts 2 Prewire Sch Prewire 3 Prewire Sch Prewire 4 Install Devices Order Parts 5 Install Devices Sch Install 6 Install Devices Install 7 Install Devices Jobcost	Job Status Invoice Parts N Scheduling N Prewire Y Parts N Scheduling N Install Equipment Y Jobcost N	C Scheduled Last Tech Last Dispatch	Approved Approved By	Comments
Installs \$1,500.00	*The job will be locked and the status will be set t	to Job Complete when all tasks in the	job are approved.		
Recurring \$35.00 Labor	Job Task Sch Prewire Job Status Scheduling Phase Code Prewire Schedule Date 6(4/2014	Comments Se	quence Locks Job		
Cost Details Journals	Invoice				



Job Management (continued)

Notes List

A new button, "List", has been added to the Job Notes form. When clicking on the List button, all Notes entered for the Job will be displayed in chronological order. The most recent note will be at the bottom of the list of notes.





SedonaSchedule

Upcoming Tasks [to be Scheduled] List

A new option, Upcoming Tasks, has been added to the Open Jobs List in SedonaSchedule. When

clicking on the new green checkmark button at the top of the Job List, a listing of Jobs that need to be scheduled will be displayed. Also in the header area are two fields to select how many weeks back and ahead that you want to view the Job Tasks which need to be scheduled. Once the User approves that Task in the Job record of the main application, the row will drop off of the Upcoming Tasks list in SedonaSchedule.

+	÷				Sedo	naSchedule - Sed	onaSecurity 5.6.2	16				_ = X
Viev	v Service Optio	ns										
	2			🤌 🔍 🔞 R O M	emoved Parts liscellaneous Appointments	Open Custon Refresh Schell	ier dule					
Show/Hide Calendar Bar	Today Day	Week Month	Queue Ticket	up Inspection 📈 0	pen Jobs	Ticket	譜					
Naviga	atiz			Arrangement		Tools						
	Wks back 1 🗄	Wks ahead 💈	2 🔅 Double-	click opens Schedule	fotal Upcoming Tasks: 3							
Drag a colun	nn header here to g	roup by that col	umn.									
Ē Job #∆⊽	Customer # 🖙	Commercial 🗸	Job Type	∽ Site Name 5	7 Address 5	7 City [•]	🛛 Task Code	▼ Schedule Date マ	Last Service Tech 🛛 🗸	Start Date 🛛 🖓	Task Code Description ♥	Percent Cor
▶ 370	21711	N	CCTV-Large	C_ Hill, Cristopher	81 Field Stone Run	Solon	Instal	06/02/2014			Installation	0.00
381	221	N	Intrusion - Res	d Pamela Price	1 Price Lane	Plymouth	Sch Prewire	06/04/2014		06/04/2014	Schedule Prewire	0.00
381	221	N	Intrusion - Res	d Pamela Price	1 Price Lane	Plymouth	Sch Install	06/05/2014		06/04/2014	Schedule Install	0.00

SedonaSchedule (continued)

Bill Ticket to Next Cycle

A new feature has been added to SedonaSchedule which allows you to invoice all the charges for a Ticket on the next Cycle Invoice that will be created for the System. If there are recurring lines setup at the System Level for the System on the Ticket, and the next cycle date is beyond the current month, on the Ticket Billing form, the *Bill to Cycle* area will display the next cycle date. If the User clicks on the

Add to Next Cycle button Add to Next Cycle, the charges are tagged to appear on the next cycle invoice. Any expenses for the Ticket will record to the General Ledger as normal, however, no income will be recorded for the Ticket until the customer's next cycle invoice is posted.

Access to the new *Add to Next Cycle* button is controlled by a new User Group Security option. This new security option is found in the SV permissions area and is labeled "*Bill Ticket to Cycle*".

				Ticket #3170		x
	Ticket	Central Station				
Service Ticket	Custom Fields	Appointments and Labor	nents Equipment Jour and Parts Go To	al Notes Other P	Urchase Service Ticket Orders History	Ticket Group Notifications
Customer	r 105 Ashlev	Victoria	Created 6/7/201	4 9:01:32 AM	Contact	*
Site	Victori	a Rose Flower Shoppe	Created By carolynj		Phone	Ext
	Plymo	Main uth MI 48170-	Status Resolve	d	Notify	
Contact	g Overrides cet ≥ Date			Ticket Chai Total Parts Total Labor Total Other Sub Total Total Pendir Rill to Cycle Next Cycle Dal	rges	Tax 13.39 16.80 5.60 35.79 \$547.04
		Add Resolution Note to Invo	ice 🔒 Create Invoid	e Close Tick	et After Adding to Cycle	🕞 Add to Next Cycle
FSU Paym Remit	ent Receive ttance	d				

SedonaSchedule (continued)

Ticket Comments Security

A new User Group Security option, "Edit Customer Comments", has been added to the SV permission group. If the User is not granted this permission, they will not be able to edit the Comment field on the Service Ticket form after the initial save of the Ticket.

In the screen shot below, the User does not have permission to edit the Comments field; notice the field is dimmed out and not available for data entry.

Ticket Central Station View Custom Appointments Billing Documents Equipment Journal Notes Offer Purchase Service Ticket Ticket <th>(Ba) Ticl</th> <th>ket #2952</th>	(Ba) Ticl	ket #2952
Service Custom Appointments Billing Documents Equipment Journal Notes Other Purchase Service Ticket Ticket Ticket Customer 5774 Created 2/19/2014 4:17:53 AM Contact Image: Contact </td <td>Ticket Central Station</td> <td></td>	Ticket Central Station	
Customer 5774 Johnson, Michael Created 2/19/2014 4:17:53 AM Contact Image: Contact Site Michael Johnson 2235 Mills Created By Administrator Phone Ext Pymouth MI 48170 Status Resolved Notify Image: Contact Image: Contact Site and System Detail Status Resolved Notify Image: Contact Image: Contact System Type Intrusion Image: Contact Image: Contact Image: Contact Image: Contact System Type Intrusion Image: Contact Image: Contact Image: Contact Image: Contact System Type Intrusion Image: Contact Image: Contact Image: Contact Image: Contact Panel Type UNKNOw/N Image: Contact Image: Contact Image: Contact Image: Contact Location 3780 Image: Contact Image: Contact Image: Contact Image: Contact Next Inspection 3/1/2014 12:00:00 AM Image: Contact Image: Contact Image: Contact Image: Contact Site Phone If 34) 563:1459 Image: Contact Image: Contact Image: Contact Image: Contact Map Code 9113 Image: Contact Image: Contact Image: Contact Im	Service Custom Fields Appointments Billing Documents Equipment Journal 1 (0) Go To	Notes Other Purchase Service Ticket Ticket (1) Items Orders (0) History Log Group
Site and System Detail System Account 3350-0 System Type Intrusion Panel Type UNKNOWN Location 3780 Next Inspection 3/1/2014 12:00:00 AM Site Phone (734) 563:1459 Map Code 9119 Cross Street 3780 Warranty One Year P & L Warranty End Expired Memo 9119	Customer 5774 Johnson, Michael Created 2/19/2014 4:1 Site Michael Johnson 2235 Mills Created By Plymouth MI 48170 Status Resolved	17:53 AM Contact Phone Ext Notify
Map Lode 9119 Cross Street 3780 Warranty One Year P & L Warranty End Expired Memo 9119	Site and System Detail System Account System Type Intrusion Panel Type UNKNOW/N Location 3780 Next Inspection 3/1/2014 12:00:00 AM Site Phone (734) 563:1459	Ticket Detail Problem Code Changes Secondary Problem Image: Code Changes Route Code Image: Code Changes Expertise 4 Priority Low Estimated Length 60
Comments P0 #	Map Code 9119 Cross Street 3780 Warranty One Year P & L Warranty End Expired Memo 9119 Comments Image: Comment state	Comments change code for Michael Johnson Sr.

SedonaSchedule (continued)

Ticket Queue – New Fields

Three new fields have been added to the Field Choose List in the Ticket Queue. These new fields are Panel Type, Customer Branch and Site Branch.

+ Vie) ↓ ‱ Servic	e Options	Service Ticke Qu	et Queue O						Sedona	Schedule - Sedon	aSecur	ity 5.6.216		
Show/Hide Calendar Ba	Today	Day Week	Month	Ticket Queue Group	Q Inspection Creation	 Rei Mit Mit Op 	moved Part scellaneous en Jobs	s Appointments	🕕 V War	Varning Count = 10 ning List 🔹	Tickets On Site Tickets List 💌	S C R Ticke	Open Customer Lefresh Schedule t	#2	
Naviç	ation			Arran	ngement					SedonaMonil	tor		Tools		
Drag a colu	ımn header he	ere to group by	y that columi	n.					2			_	`		
🖆 Ticket 🗸	Created On	7	Name 7	7 Site Address	V	City 🗸	State 🗸	Zip/Pos ∆ 🏹	Cust Brai	nch 🛛 🔽 Site Branch	√ Panel	V	Scheduled 🛛 🗸	Techni 🔽	Cust Commen
3006	03/17/2014		Emilie Bruce	8 Oakwood Av		Plymo	Michigan	48170	M	MI	FBI 4600		3/17/2014 1:00 P	Marshall	Smoke detect
3034	03/30/2014		Service, Sa.	231 Firestone D	Irive	Plymo	Michigan	48170	MI	MI	VISTA 128	BP	3/18/2014 1:00 P	Mark Tay.	
3033	03/30/2014		Service, Sa.	. 231 Firestone D	Irive	Plymo	Michigan	48170	MI	MI	VISTA 128	BP	3/18/2014 2:00 P	Mark Tay.	
3099	04/10/2014		Michael Joh	2235 Mills		Plymo	Michigan	48170	МІ	MI	UNKNOWI	1	4/10/2014 9:00 A	Madison	1
3150	05/29/2014		Pamela Pric	1 Price Lane		Plymo	Michigan	48170	М	MI					
2928	02/07/2014		Ashley, Vict.	. 1022 Wayne Ro	oad	Salem	Michigan	48175	МІ	MI					testinbg
3068	04/02/2014		Ashley, Vict.	. 1022 Wayne Ro	oad	Salem	Michigan	48175	М	MI			4/2/2014 12:00 P	Marshall	
3116	04/30/2014		Ashley, Vict.	. 1022 Wayne Ro	oad	Salem	Michigan	48175	М	MI					
3146	05-100-1001		Ashley, Vict.	. 2001-B Greenle	af Road	Westla	Michigan	48185	м				5/29/2014 8:00 A	Mike Wal.	Install new
-					Lane	Canton_	Michigan						1/23/2014 4:30 P	Milton M	Lection

SedonaSchedule (continued)

Notes List

A new button, *List*, has been added to the bottom of the Ticket *Notes* form. When clicking on the *List* button, all Notes entered for the Ticket will be displayed in chronological order. The most recent note will be at the bottom of the list of notes.





SedonaSetup

Service Company Subcontractors

A new tab, *Subcontractor*, has been added to the Service Company setup table to allow you enter specific information related to the company. This new tab is only available for Service Providers (check the Include Vendors checkbox on the Service Company setup). If the Service Provider is assigned to a Ticket, when hovering your mouse over the Service Company field on the Ticket, an information bubble will display with any information entered on the Subcontractor form or any of the three additional forms (Insurance, Licenses, Travel). On the Licenses and Travel forms, all fields are text type and will allow up to 50 characters.



SedonaOffice® The #1 Financial Software for Security Companies

Version 5.6.219 Release Notice

-	Ticket #3171 X
Ticket	Central Station
Service Ticket	Appointments Billing Documents Equipment Journal Notes Other Purchase Service Ticket Ticket <t< th=""></t<>
Customer 221 Pame Site Pame 1 Price Plymo	Created 6/8/2014 6:05:19 AM Contact Isa Price Created By carolynj Isa Price Created By carolynj Isa Price Status Scheduled Notify Image: Scheduled Notify
Site and System System Account System Type Panel Type	Detail Ticket Detail Ticket Detail Problem AC Power Failure Secondary Problem Route Code
Next Inspection Site Phone Map Code Cross Street Warranty Warranty End	Subcontractor Info: 3 Hire Date: 1/1/2011 Medium Payment Method: American Express Medium Other Item: Fuel Surcharge 60 Amount: 25.00 License: Elect: MI 3565580 License: Contr: MI C765542 Service Rate (Standard): 150.00 Service Rate (Weekend): 175.00 Trip Charge: 90.00 Travel: Amouffice and Office
Comments Notes	Area: 90 Miles from Ornice Distance: 50 Miles Turn Around Time: 2 days Insurance: Auto Insurance Expires: 12/31/2014 Liability Insurance Expires: 12/31/2014 Worker's Comp Expires: 12/31/2014
Service Company Service Level Receiver/Transmitte	ABC Service Provider Image: Construction of the Construc
	Vendor Service Save 1



SedonaSetup (continued)

Instruction Notes

A setup table, *Instruction Notes*, has been added to the SV area of SedonaSetup. This setup table is used to create a list of special instructions that may be added to any Ticket. The *Name* field is a text field and will allow up to 50 characters and the *Note* field, which is also a text type field will allow up to 1,024 characters. Once a list of Instruction Notes has been created, they may be inserted manually into any Ticket on the Notes form by clicking on the new *Instructions* button.

Instruc	ctions Notes			
	Instruction Notes L	.ist		
	Instruction Name		Instruction Note	Inactive
	Smoke detector rep	air	Always checks the wiring before you open up the box. It may e Don't try and fix it. Just rip it off the ceiling and install a new on	N
	Include Inactive	9		
=	Instruction Note -		r	In <u>a</u> ctive
	Name	Smoke detector r	repair	
	NUTE	Durit ory and fix i	n, remove and replace with a new device,	
			<u>A</u> pply <u>N</u> ew	Delete
ervice Cust incket Field ustomer 2 ite P ite P otes	and Appointments Bill Appointments Bill amela Price Armela Price Price Lane Price Lane Tymouth MI 48170	ng Decements Equip (0) Created Created Select Instructions Name Smoke detector repair Don't try and fix it. Remo		Ext Edited By
iccess Level	2 - Customer Restricted	Resolution Note		ew Save

SedonaSetup (continued)

User Group Security

Several new permissions have been added to the SV group of User Group Security.

• <u>Export Ticket Queue</u> – If this permission is granted, the User will be able to click on the Export to Excel Button located on the Queue Ribbon.

B	+ =		Service T	icket Queue O.							SedonaSched	lule - SedonaSe	ecur	ity 5.6.216	
	View	Service Options		Queue											
Open	(C) Appointment	It No Appointment	Go Resu Back) 💦 💦	ved Closed	Queue Viev Use I I Export	Service Date Range to Excel	Ticket							1
				Vie	N										1
Drag a	column he	ader here to arou	o by that colu	umn.											
- F 1		10													
FILCKE	a v Lleau		XX Mana			Ca. 77	01-1- 77	7-0-0	Curt Durach	-	Char Danach 🛛 😾	Denal		C.L.A.L.A	
3006	03/17	d Un 2014	✓ Name Emilie Bru	Site Addr	ess ⊽ od Av	City ⊽ Plumo	State ⊽ Michigan	Zip/Pos ∆ 🏹 48170	Cust Branch	∇	Site Branch 🛛 🟹	Panel EBL 4600	V	Scheduled	\ ∏ P
3006	03/17.	2014 2014	V Name Emilie Bru Service		od Av one Drive	City ⊽ Plymo… Plymo	State ⊽ Michigan Michigan	Zip/Pos △ ▽ 48170 48170	Cust Branch MI MI	V	Site Branch ⊽ MI MI	Panel FBI 4600 VISTA 1288P	V	Scheduled 3/17/2014 1:0	⊽ 0 P 0 P.
3006 3034 3033	03/17. 03/30. 03/30.	2014 2014 2014 2014	Vame Emilie Bru Service, Service	▼ Site Addr ice 8 Oakwo Sa 231 Firest Sa 231 Firest	ass ⊽ od Av one Drive one Drive	City マ Plymo Plymo Plymo	State ⊽ Michigan Michigan Michigan	Zip/Pos 4 マ 48170 48170 48170	Cust Branch MI MI	~	Site Branch T MI MI	Panel FBI 4600 VISTA 128BP VISTA 128BP	V	Scheduled 3/17/2014 1:0 3/18/2014 1:0 3/18/2014 2:0	♥ 0 P 0 P
3006 3034 3033 3099	03/17/ 03/30/ 03/30/ 03/30/ 04/10/	2014 2014 2014 2014 2014 2014	Vame Emilie Bru Service, Service, Michael	▼ Site Addr ice 8 Oakwo Sa 231 Firest Sa 231 Firest Joh 2235 Mills	ess ⊽ od Av one Drive one Drive	City ⊽ Plymo Plymo Plymo Plymo	State ⊽ Michigan Michigan Michigan	Zip/Pos △ ▼ 48170 48170 48170 48170 48170	Cust Branch MI MI MI MI	V	Site Branch V MI MI MI MI	Panel FBI 4600 VISTA 128BP VISTA 128BP UNKNOWN	V	Scheduled 3/17/2014 1:0 3/18/2014 1:0 3/18/2014 2:0 4/10/2014 9:0	♥ 0 P 0 P 0 0
3006 3034 3033 3099 3150	03/17/ 03/30/ 03/30/ 03/30/ 04/10/	d Un 2014 2014 2014 2014 2014	✓ Name Emilie Bru Service, Service, Michael - Pamela	▼ Site Addr ice 8 Oakwo Sa 231 Firest Sa 231 Firest Joh 2235 Mills Pric 1 Price La	ess ⊽ od Av one Drive one Drive	City ⊽ Plymo Plymo Plymo Plymo	State ⊽ Michigan Michigan Michigan Michigan	Zip/Pos A V 48170 48170 48170 48170 48170 48170	Cust Branch MI MI MI MI	▼	Site Branch V MI MI MI MI MI	Panel FBI 4600 VISTA 128BP VISTA 128BP UNKNOWN	V	Scheduled 3/17/2014 1:0 3/18/2014 1:0 3/18/2014 2:0 4/10/2014 9:0	0 P 0 P 0 0

- <u>Edit Customer Comments</u> If this permission is granted, the User will be able to edit the Comments field on the Service Ticket form after the initial save of the Ticket. Users not granted this permission will be able to enter text into the Comments field when initially creating a ticket. Once the ticket is saved, the Comments field will be dimmed out and will not allow any changes.
- <u>Bill Ticket to Cycle</u> If this permission is granted, the Add to Next Cycle button will be available to mark the billable charges to be invoiced on the next cycle invoice.

ò <u>o</u> de	Description		Level	Credit Mem	o Lim
Administrator Administrator			3	\$100,000.00	
Application Access Rep	ort Access				
Access		Module			
Able to Remove Parts fro	m Service Tickets	SV			
Use New Service	SV				
🛛 🗹 Override Billable Charges	SV				
Change Ticket Category	SV				
Select Closed Service Tic	SV				
Override Parts Reconcile	SV				
Export Ticket Queue	SV				
Edit Customer Comments	SV				
Bill Ticket to Cycle	sv				
General Documents		DX			
Allow Document Edit (All I	DX				
Allow Document Delete (A	All Documents)	DX			
SQL Query Window		55			-

Application Corrections

Accounts Payable

Close Out Vendor Returns (Support Ticket# 73954): Corrected a reported issue; Unable to close out a Vendor Return if no credit is expected if the accounting period has been closed. They checkbox "Close – No Credit" is now available for closed accounting periods. Vendor Returns will be written off as of the date the checkbox is selected and the record is saved. The G/L account used to clear the Inventory Receipts account will be the account set up in A/P GL Account Defaults/Write Off Non-Bill Receipt Acct.

Accounts Receivable

- Job Credit Memo for Master Accounts (73479): Corrected a reported issue; when a Credit request is created for the purpose of changing the tax group on a job invoice (within job) for a subaccount where invoices are flagged to post to the Master Account, the credit is being posted to the subaccount instead of Master Account and posts the new invoice to Subaccount instead of Master Account.
- Credit Request Assigned To Employee (Support Ticket# 74247): Corrected a reported issue; when changing the Assigned To on Credit Requests, inactive employees were appearing on the drop-down list.

Client Management

- Job Documents (Support Ticket# 72059): Corrected a reported issue; documents attached to Tickets were appearing in the Job Documents folder within the customer tree.
- **Recurring Line Last Rate Increase Date (Support Ticket# 71901)**: Corrected a reported issue; when performing a rate increase from the customer explorer, the recurring line was not being updated with the last rate increase date.

Job Management

• Job Appointments (Support Ticket# 73198): Corrected a reported issue; after entering dispatch times for Job Appointments, the Job Appointments List would display the words "completed" instead of displaying the Dispatch, Arrived, and Departed date/time.

Application Corrections (continued)

SedonaDocs

• Job Documents Folder: Corrected a reported issue; Documents saved to Tickets were appearing in the Job Document folder.

SedonaSchedule

- **Charges Printed on Ticket**: Corrected a reported issue; when printing a Ticket, the charges displayed in the Charges Block did not always agree with the information shown on the Billing form of the Ticket.
- Queue Settings not being Remembered (Support Ticket# 62868): Corrected a reported issue; when closing SedonaSchedule using the Wrench Icon in the upper left corner of the application, the User's Queue settings were not being remembered.
- Inspection Ticket Category (Support Ticket# 63854): Corrected a reported issue; the default service category was always being assigned to Inspection Tickets. Now the Category assigned to the Service Company for the Inspection Ticket will be used when generating new Inspection Tickets.
- **Resolved Ticket Queue Refresh (Support Ticket# 73942)**: Corrected a reported issue; after closing a ticket from the Resolved Ticket Queue, the application was not refreshing the list of tickets or count at the bottom of the list.
- SedonaSchedule Crashing when dragging appointments: Corrected a reported issue; under certain circumstances, when the Auto-Refresh is turned ON, the application would crash when dragging appointments within the schedule board.
- **Clock In on Job Appointments (Support Ticket# 74460)**: Corrected a reported issue; when two techs are scheduled on a job and they are both clocked out for lunch on the schedule, the application was allowing only one of the techs to be clocked in.



Application Corrections (continued)

 Do Not Allow Negative Parts (Support Ticket# 74481): Corrected a reported issue; when the Inventory Setup option "Do Not Allow [Negative Quantities]" is in force, parts were allowed to go negative in a warehouse when enough stock was not available. A new message will be displayed and will stop the user from saving a quantity of a part where there is not enough in the warehouse.



If the Inventory Setup option is set to "Display Warning Message", the user will be presented with a message, but be allowed to save the part to the ticket if the quantity would cause the inventory in the warehouse selected to go negative.



Report Manager

- **RMR 12-Month Roll-Forward***: Corrected a reported issue; when selecting the "End of Month" option, no data was being returned in the report.
- Closed Service Ticket Cost*: Corrected a reported issue; when