



Release Notice

Version 5.7.24

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SedonaOffice

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About this Document

This Reference Document is for use by SedonaOffice customers only. This document is not intended to serve as an operating or setup manual. Its purpose is to provide an overview of the enhancements and corrections made in the release and is to be used for reference purposes only.

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Overview

This document is being provided to explain the changes made to the SedonaOffice application since Version 5.7.18. This is an intermediate version update that contains new features and application corrections.

Revision

This document was revised on February 6, 2017 to clarify that the use of Custom Job Costing Buckets will directly affect the totals seen on all job costing reports within Report Manager. The amounts in these buckets will not be included in any of the job costing reports.

Application Enhancements/Improvements

Accounts Payable

ADI Integration

The application now prevents the creation of a bill from downloaded data where the invoice number already exists in SedonaOffice.

Accounts Receivable

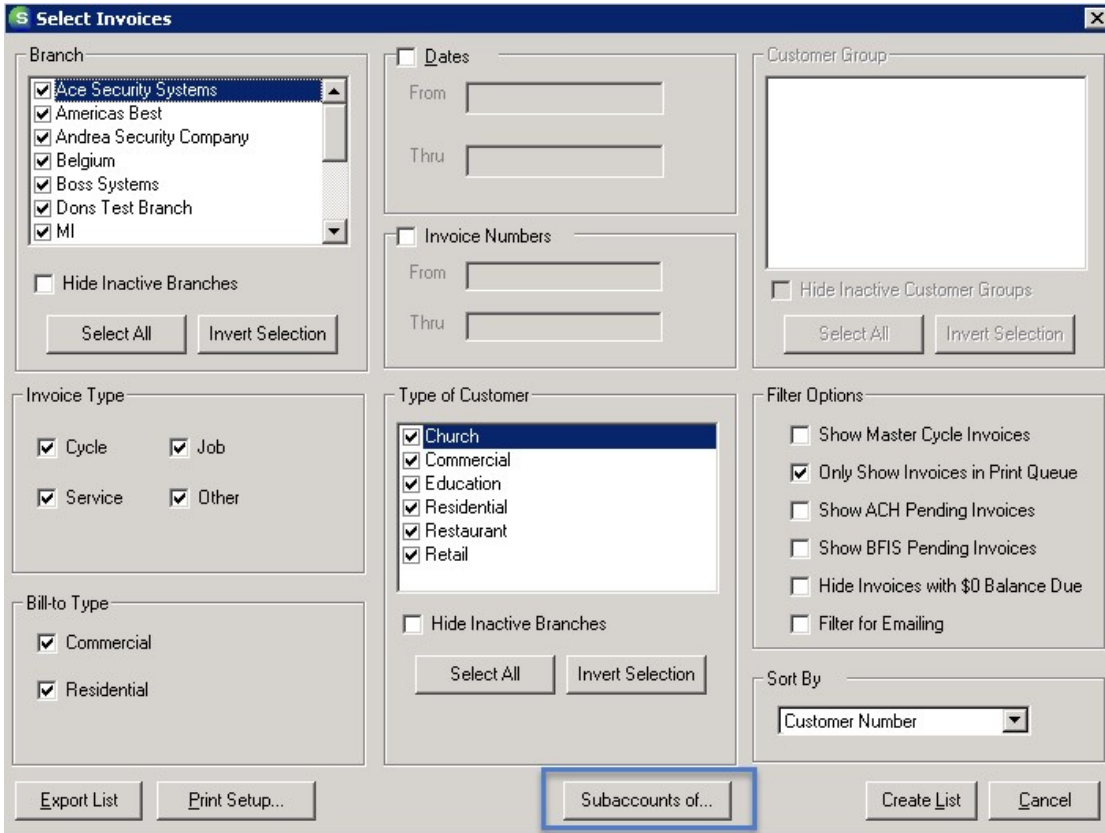
Payment Options

When a new credit card is added to Payment Options on a customer's account, the validity of the number as an actual credit card number will be checked and the Type field will auto populate based on the credit card number entered.

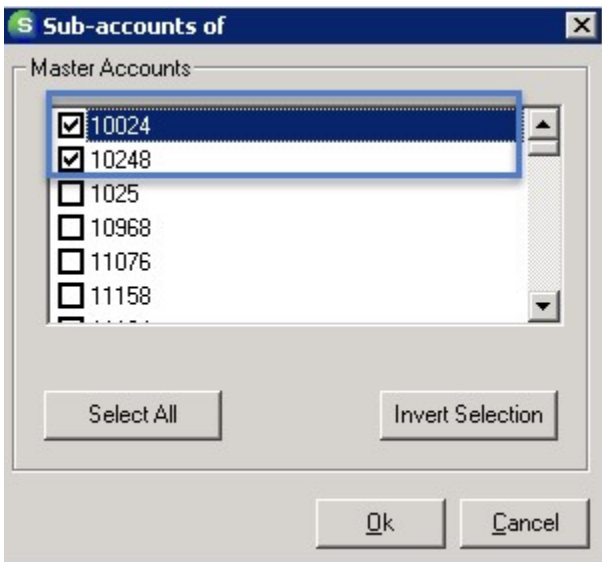
The screenshot shows the 'EFT Setup 388 Wagging Tails Pet Spa' window. The top left corner displays customer information: Customer Number: 388, Wagging Tails Pet Spa, Waggin Tales Pet Spa, 458 Canton Center Road, Canton, MI 48187, (734) 948-1212. The window is divided into two main sections: 'Customer Banks' and 'Credit Cards'. The 'Customer Banks' section includes fields for 'Banks On File', 'Bank', 'Name on Account * (Not Business Name)', 'Account Number *', 'Payment Method', 'Auto Processing' (Recurring/Non-Recurring), 'Hold Day', 'Days Past Inv Date', and 'Auto Bill To Recurring'. The 'Credit Cards' section includes fields for 'Cards On File', 'Name on Card *', 'Card Number *', 'Type', 'Expiration *', 'Bill Street Address', 'Bill Postal Code', 'Payment Method', 'Auto Processing' (Recurring/Non-Recurring), 'Hold Day', 'Days Past Inv Date', 'Print Cycle Invoices', and 'Auto Bill To Recurring'. A blue box highlights the 'Type' field in the 'Credit Cards' section, which is set to 'VISA'. At the bottom of the window, there are 'New Transaction' and 'Close' buttons.

Print Invoices

The Print Invoices screen has been updated to include a new button “Subaccounts of...”



This button will enable a list to appear of all open invoice which meet the criteria chosen that are being billed directly to the subaccounts of the specific master account(s) chosen.



Client Management

Customer Equipment List

When parts are added to the customer's equipment list after the close of a job, the equipment edit form on each part will show the manufacturer's warranty end date based on the term of the warranty as defined on the part's detail screen and the start date of the warranty as of the close of the job.

The screenshot shows a software window titled "Equipment Edit 388". It is divided into two main sections: "Customer Information" and "Equipment Detail".

Customer Information:

- Site: Wagging Tails Pet Spa
- Address: 458 Canton Center Road
- System: 388 Fire

Equipment Detail:

- Part Code: 016105X32D (Description: UNIVERSAL DOOR STRIKE 12 VAC/DC)
- Quantity: 1
- Price: \$0.00
- Location: (empty field)
- Local Zone: (empty field)
- Serial Number: (empty field)
- Lot Number: (empty field)
- Manuf Warranty: Six Month (dropdown menu)
- Warranty Start: 10/2/2015 (calendar icon)
- Manuf Exp Date: 4/2/2016 (calendar icon)** (This field is highlighted with a blue border in the screenshot)
- Other Warranty: (empty dropdown menu)
- Covered By Contract

At the bottom of the window are "Save" and "Close" buttons.

Jobs

Current On-Hand Quantities – CTRL-Q

A new feature has been added where the user can place the cursor on the name of a part within a purchase order and press CTRL+Q. The on-hand quantity for the part in all warehouses will be displayed.

New Purchase Order

Vendor: Tri-Ed Category: Jobs Com

Purchase Order

Tri-Ed
P.O. Box 402433
Atlanta, Georgia 30384
Phone: (800) 366-4472
Fax:
Ship To: 547 Washington
Chagrin Falls, OH 44022

PO Number: 2119 Branch: OH Warehouse: Main-OH

Tracking #: Order Date: 9/28/2015 Acknowledged

Ship Date: Ship Method:

Parts Dye Date: Job Number: 1083

Rachel Ambrose
 Select from All Parts

Parts List

Part	Description	Vendor Part	Pkg Qty	Quantity	Cost	Amount	Rcvd	Std Cost	BO
232FX	232FX STAND ALONE ACCESS	232FX	1	1	200.00	200.00		246.67	<input type="checkbox"/>
621GREXDP	HEAVY DUTY EXIT BUTTON W/DELAY	LC-621GREXDP	1	1	72.38	72.38		72.38	<input type="checkbox"/>

Current On Hand - 232FX

Warehouse	On Hand	On Order	Committed
Main-OH	0	0	0

Total Cost: \$272.38
Received Cost: \$0.00

Apply OK Cancel

Custom Job Costing Buckets

Prior to this version, the job costing buckets had been predefined as Material 1, Material 2, Labor, Overhead, Commissions, and Other. With this release, users may define the names of up to 3 custom job buckets which fall into the expense type of "Other" (e.g. Permits, Freight, Equipment Rental, etc.). Expenses that do not fall into these groupings will still show in the job expense type of "Other" on the job costing screen.

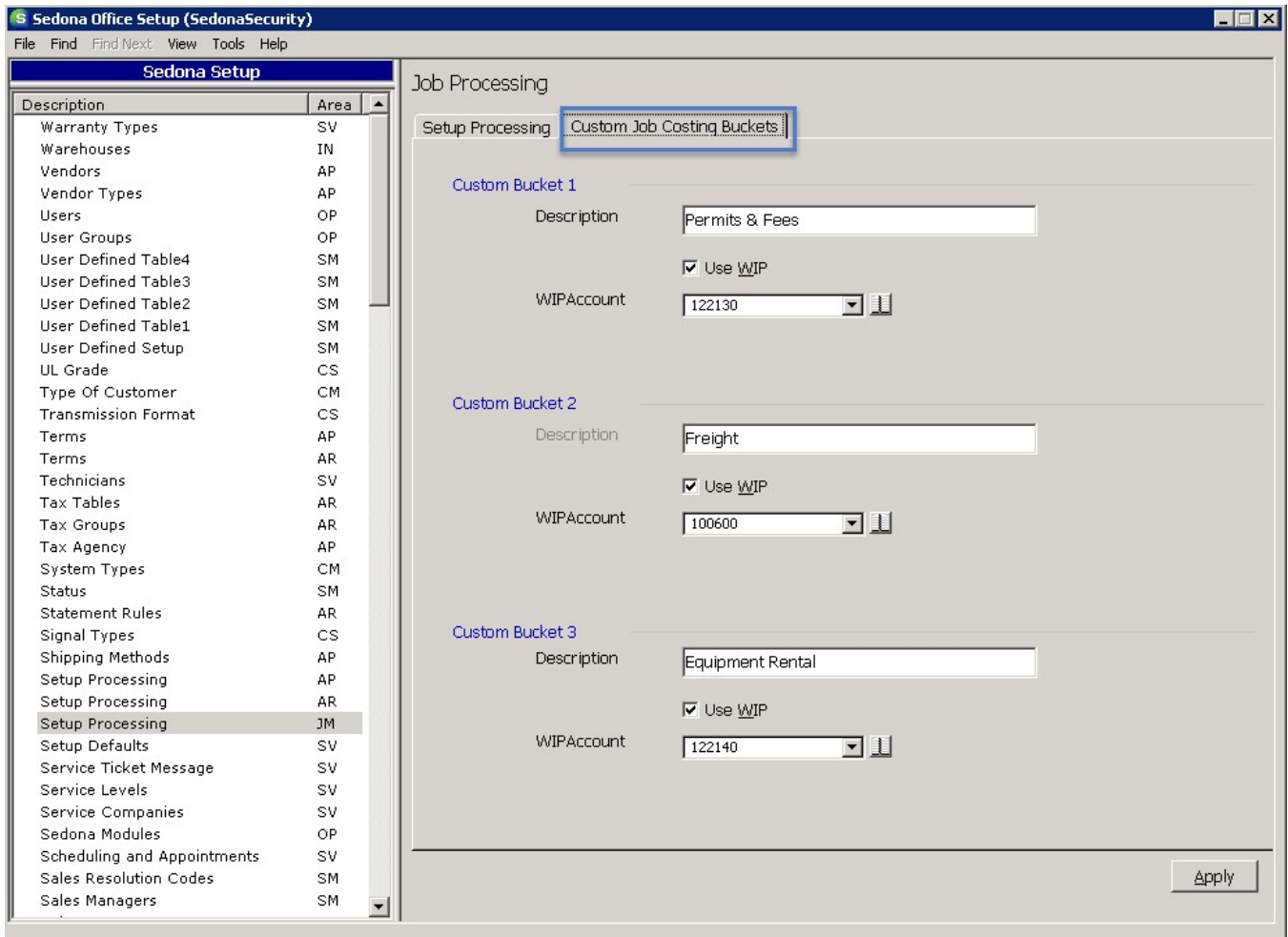
Job	Customer	Site
Job Number 1107	10014	United Bank-Northampton
Job Type Fire-Com	United Bank-Northampton	United Bank-Northampton
Job Status Job Complete	491 Pleasant St.	491 Pleasant Street
System 10014 Fire	Drive-Up	Detroit, MI 48201
Labor Units 0 (8 Used)	Detroit, MI 48201	(313) 229-1414
	(586) 787-7211	

Estimated	Actual	WIP
Income	Income	Material 1 \$0.00
Install Charge \$1,500.00	Install Charge \$1,500.00	Material 2 \$0.00
Change Orders \$0.00		Labor \$0.00
Costs	Costs	Permits_Fees \$0.00
Parts \$450.00	Parts \$448.75	Freight \$0.00
Labor \$400.00	Labor \$400.00	Equipment Rental \$0.00
Overhead \$0.00	Overhead \$0.00	Overhead \$0.00
Permits_Fees \$25.00	Permits_Fees \$25.00	Commissions \$0.00
Freight \$35.00	Freight \$35.90	Other \$0.00
Equipment Rental \$100.00	Equipment Rental \$100.00	Total WIP \$0.00
Other \$0.00	Other \$15.00	
Sub Total \$1,010.00	Sub Total \$1,024.65	Recurrences
Sub Profit/Loss \$490.00 33%	Sub Profit/Loss \$475.35 32%	Est
Commissions \$0.00	Commissions \$0.00	Job RMR \$25.00
Total \$1,010.00	Total \$1,024.65	Act
Profit/Loss \$490.00 33%	Profit/Loss \$475.35 32%	Activated RMR \$25.00
	Hold Back \$0.00	

The new buckets will be visible on the job costing section of a job ticket only. **Their contents will not be included in any of the job costing reports with Reports Manager.** Customers who elect to use this feature will find that their job costing reports do not reflect what is being displayed on the screen as the contents of the custom buckets do not carry over to any of the job costing reports.

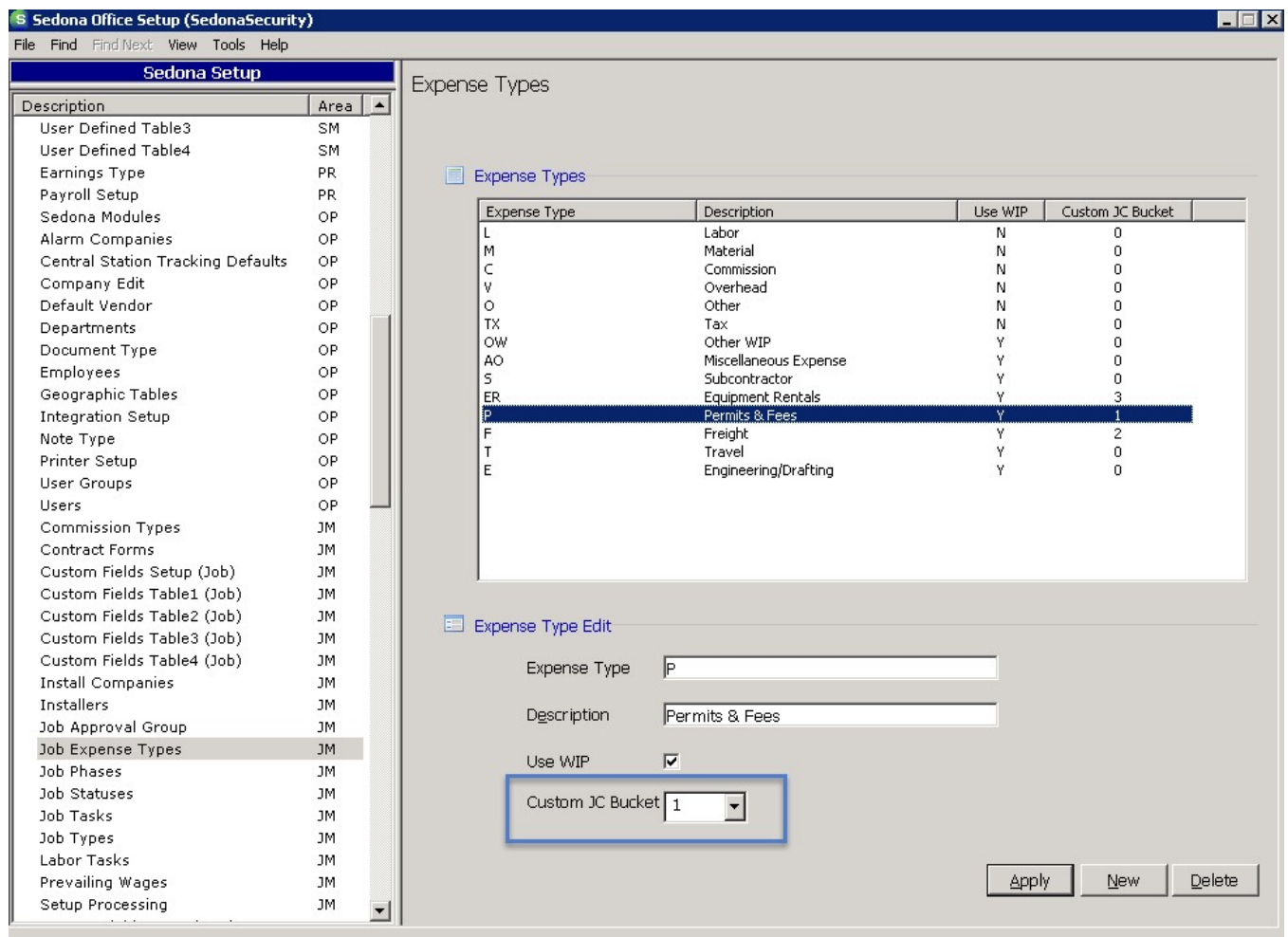
Setting Up the Custom Job Costing Buckets

Navigate to the Setup Processing table for JM in the SedonaOffice Setup tables. A new tab has been added entitled “Custom Job Costing Buckets.” Define the three custom job buckets. If WIP will be used, place a checkmark in the box and define the General Ledger Numbers for WIP that should represent each bucket.



Defining the New Job Expense Types

New job expense types must be defined for use with these buckets. The first expense type to appear on the job costing screen must be assigned the number “1” in the Custom JC Bucket field. The second will be given number “2” and the last number “3.” All other job expense types will retain the number “0” and will continue to appear in the bucket entitled “Other.”



Assigning the new Expense Codes to GL Numbers on AP Vendors

Job costing expense types are directly associated with the general ledger numbers on the vendor records. To have these new expense types come in correctly onto new bills, it may be necessary to update the job expense types on vendor records. In the example below, GL 510006 has been modified to show the job expense type of “ER” for Equipment Rental instead of “O” for “Other”:

The screenshot shows the 'Vendor Bentley Construction Company Edit' window. At the top, the Vendor Code is 'Bentley Construction Company', Vendor Type is 'Sub Contractor', and Branch is 'OH'. The Category is 'Jobs Res'. Summary statistics show: Open Bills: 400.00, Open Credit: 0.00, and Net Due to Vendor: 400.00.

Below the summary is a tabbed interface with 'GL Accounts' selected. A table lists the GL Accounts:

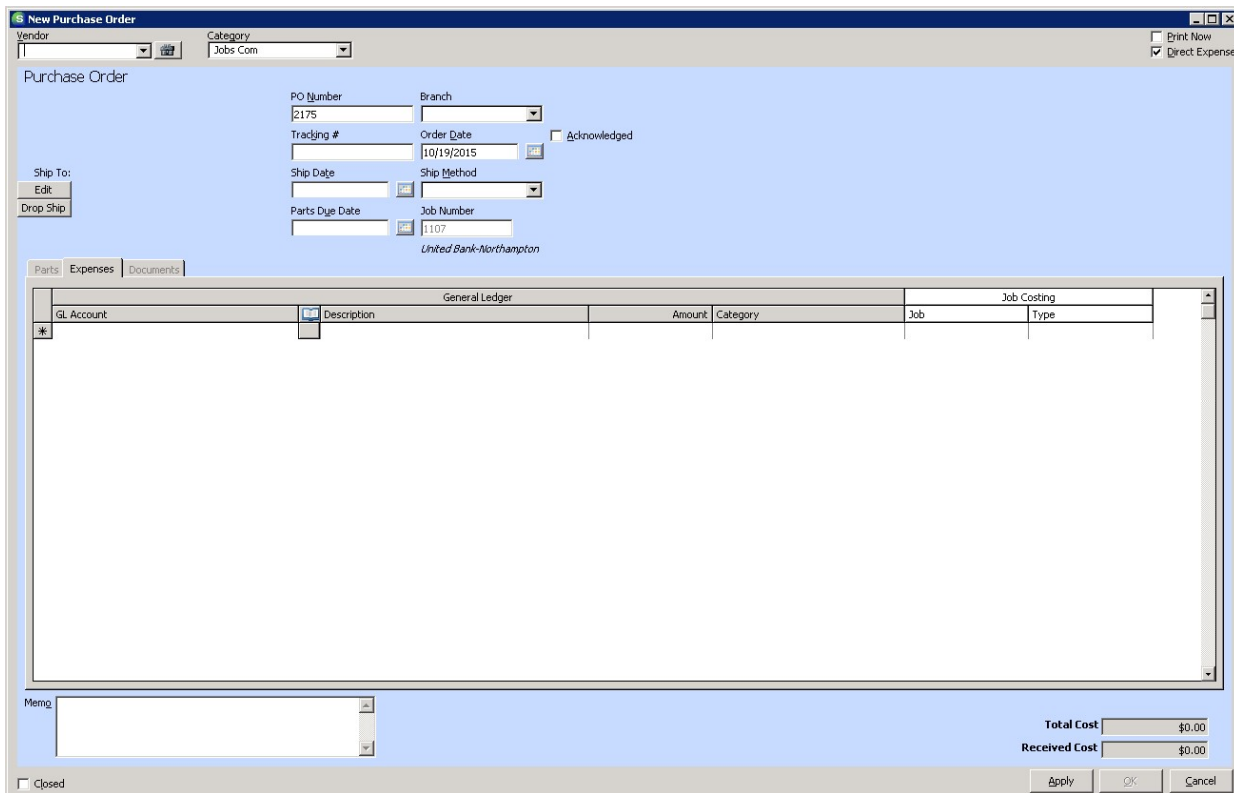
Account	Description	Default Amount	Expense Type
510006	COS - Jobs-Equipment Rental	\$100.00	ER
520006	COS - Service-Equipment Rental	\$200.00	ER

At the bottom of the window, there is a detailed view for the selected account (510006). The Description is 'COS - Jobs-Equipment Rental' and the Default Amount is '\$100.00'. The Expense Type is set to 'ER'. The 'Add/Update' button is highlighted with a blue box.

At the bottom left, there are checkboxes for 'Inactive' and 'Secure Vendor'. At the bottom right, there are 'Save' and 'Close' buttons.

Purchase Orders

It is now possible to create a purchase order for subcontract labor within a job. When selecting this option, a blank purchase order will appear where a specific vendor may be chosen for the services required.



Reports

AP Retroactive Aging Report

Several new options have been added to this report.

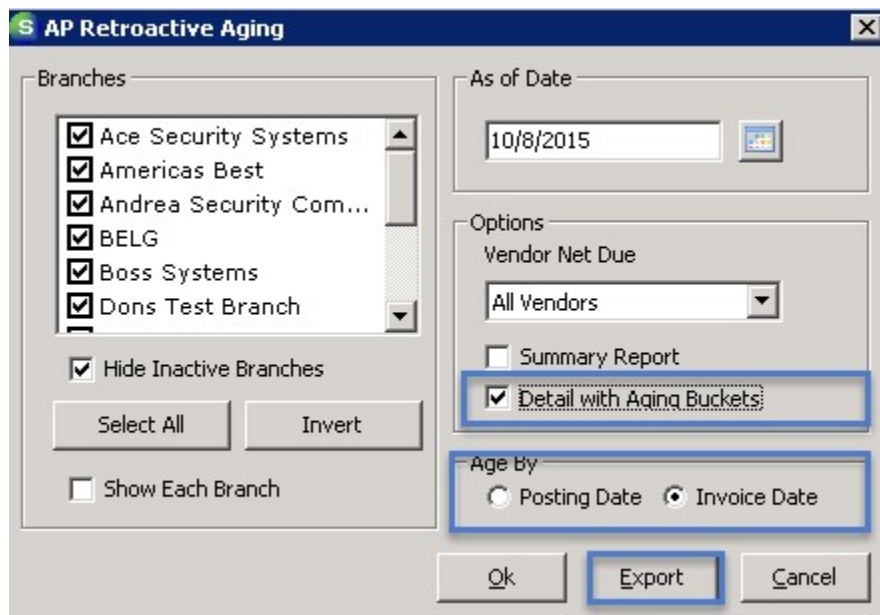
This report may now be exported into a .csv format.

An option has been added to age by invoice date. The prior version of this report used the posting date for two purposes:

1. To select which vendor bills and credits will be selected
2. Calculate how many days the invoice was past due.

This new feature still uses the posting date to select which bills and credits will be selected so that it ties to the General Ledger, but it uses the Due Date/Credit Date to calculate how many days each bill is past due.

An option has been added to include detail with the aging buckets. This shows only a few columns for each bill/credit, but it has aging buckets for Current, 1-30, 31-60, 61-90, 91-120, and over 120. Credits are put into the correct aging bucket. This is different from the Summary version which has a separate column for Credits.



AP Retroactive Aging

SedonaSecurity

All Active Branches
As of 10/8/2015

Vendor	Reference	Date	Due Date	Current	1-30 days	31-60 days	61-90 days	91-120 days	over 120	Total
A+ Cleaning Services	H8942	9/30/2015	10/30/2015	500.00	0.00	0.00	0.00	0.00	0.00	500.00
										500.00
ABC Service Provider	76421	10/12/2014	10/12/2014	0.00	0.00	0.00	0.00	0.00	200.00	200.00
	12365	10/12/2014	10/12/2014	0.00	0.00	0.00	0.00	0.00	100.00	100.00
	12345	9/26/2014	9/26/2014	0.00	0.00	0.00	0.00	0.00	100.00	100.00
	9876	10/12/2014		0.00	0.00	0.00	0.00	0.00	(15.52)	(15.52)
										384.48
ADI	12398	9/14/2015		0.00	(100.00)	0.00	0.00	0.00	0.00	(100.00)
	4341P	11/20/2014		0.00	0.00	0.00	0.00	0.00	(315.47)	(315.47)
	213213	6/5/2012		0.00	0.00	0.00	0.00	0.00	(3,514.26)	(3,514.26)
										(3,929.73)
ADI-Madrid	CM1622	6/10/2014		0.00	0.00	0.00	0.00	0.00	(45.00)	(45.00)
	RMA777	5/30/2014		0.00	0.00	0.00	0.00	0.00	(100.00)	(100.00)
										(145.00)
American Express		8/10/2015	8/10/2015	0.00	0.00	24.00	0.00	0.00	0.00	24.00
		8/6/2015	8/6/2015	0.00	0.00	0.00	100.00	0.00	0.00	100.00
		6/16/2015	6/16/2015	0.00	0.00	0.00	0.00	113,358.29	0.00	113,358.29
		5/22/2015	5/22/2015	0.00	0.00	0.00	0.00	0.00	67.50	67.50
	953856	2/24/2015		0.00	0.00	0.00	0.00	0.00	(291.12)	(291.12)
										113,258.67
Applied Wireless Identification Inc.	BCDE45	6/16/2015	7/16/2015	0.00	0.00	0.00	200.00	0.00	0.00	200.00
										200.00
ATL - ATL, Inc.	9354AQ	9/22/2015	10/22/2015	988.71	0.00	0.00	0.00	0.00	0.00	988.71
	78965H	9/22/2015	10/22/2015	100.00	0.00	0.00	0.00	0.00	0.00	100.00
	CM2165	6/22/2012		0.00	0.00	0.00	0.00	0.00	(270.38)	(270.38)
										818.33
Bentley Construction Company	GHR	10/5/2015	10/5/2015	0.00	200.00	0.00	0.00	0.00	0.00	200.00
	RST	9/22/2015	9/22/2015	0.00	100.00	0.00	0.00	0.00	0.00	100.00
										300.00

Sales Management

Prospects

It is now possible to have a new prospect created in Sales Management on the basis of a resolution code to a service or inspection ticket. When a resolution code that is marked as “Create a New Prospect” (see SedonaSetup Resolution Codes) has been applied to a service or inspection ticket, and the ticket is subsequently closed, a new prospect will automatically appear in the Prospect list within Sales Management.

The screenshot displays the 'Ticket #3598' form in the SedonaOffice application. The form is divided into several sections:

- Navigation Bar:** Includes icons for Service Ticket, Custom Fields, Appointments and Labor, Billing, Documents (0), Equipment and Parts, Journal, Notes (1), Other Items, Purchase Orders (1), Service History, Ticket Log, and Ticket Group. A 'Go To' field and a 'Notifications' button are also present.
- Customer Information:**
 - Customer: 388 Wagging Tails Pet Spa
 - Site: Wagging Tails Pet Spa, 458 Canton Center Road, Canton MI 48187
 - Contact: Barkley Wiggins
 - Phone: (734) 948-1212
 - Notify: bwiggins@wtp.com
- Created/Resolved Dates:**
 - Created: 10/15/2015 2:51 PM
 - Created By: Administrator
 - Status: Closed
 - Resolved: 10/16/2015 11:19 AM
- Site and System Detail:**
 - System Account: 987
 - System Type: Intrusion
 - Panel Type: [Empty]
 - Location: [Empty]
 - Next Inspection: [Empty]
 - Site Phone: (734) 948-1212
 - Map Code: [Empty] Timezone: [Empty]
 - Cross Street: [Empty]
 - Warranty: Full Warranty
 - Warranty End: Expired
 - Memo: [Empty]
 - Comments: [Empty]
 - Notes: [Empty]
 - Secondary Account: [Empty]
 - Keys: [Empty]
 - Service Company: MI-T&M
 - Service Level: T&M-Res
 - Receiver/Transmitter: [Empty]
- Ticket Detail:**
 - Problem: Add Equipment
 - Secondary Problem: [Empty]
 - Route Code: [Empty]
 - Expertise: 3
 - Priority: Medium
 - Estimated Length: 120
 - Comments: Additional panel for intrusion system.
 - Service Coordinator: [Empty]
 - Technician: Bernie Booth
 - PO #: [Empty]
 - Category: SVC T&M
 - Resolution: Insp Complete - Prospect** (highlighted with a blue box)
- Use Payment Information On File:**
 - None
 - Bank (0)
 - Credit Card (0)
- Save Button:** Located at the bottom right of the form.

Prospects											
<All Statuses> <All Sources> <All Departments> <All Salespeople>											
Name	Company	Address 1	Phone 1	Department	Salesperson	# Days	Follow Up	Days To...	Status	Temperature	Source
John Robinson		4114 Main Rd		Sales	Oliver Blais	839	10/24/2...	5	New	HOT	Customer Refe...
Alkins, Cassidy		6 Deer Run	(440) 678-0024	Sales	Oliver Blais	187	10/17/2...	-2	New	Cold	Trade Show
Black, Jack		100 Cherry Hill	(734) 444-4444	Sales	Jane Doe	385	10/6/2015	-13	Pending	Warm	Customer Refe...
Ashley, Victoria		2265 Towner	(734) 351-9822	Sales	Oliver Blais	1162			New	HOT	Self-Generated
Karen Richter		170 Rosebury Court	(440) 247-5603	Sales	Oliver Blais	851			New	HOT	Trade Associat...
Miller, Joe		3214 Maple		Sales	Oliver Blais	694			New	HOT	Customer Refe...
Foster, Michael		2522 Maple		Sales	Oliver Blais	694			New	HOT	Customer Refe...
Johnson, Michael		75 Avonwood Road	(734) 563-1459	Sales	Sean Wyman	602			New	HOT	Yard Sign
Cheryl Pacella		123 Anywhere Street	(216) 555-1212	Sales	Bernie Booth	427			Sold	HOT	Customer Refe...
Jonathan Smith	Barking Hound Day Car...	6505 Marsol Road	(216) 555-1212	Sales	Sean Wyman	421			Sold	HOT	Self-Generated
Blake Sheldon		123 Anywhere Street	(216) 555-1212	Sales	Bernie Booth	347			In-Progress	HOT	Customer Refe...
Barking Hound Day Car...	Barking Hound Day Car...	123 Wag Tales Lane	(216) 555-1212	Sales	Sean Wyman	311			Sold	Warm	Self-Generated
Latoria Blackmon-Lipsc...		45691 Anywhere Str...	(734) 555-12...	Sales	Sean Wyman	161			New	Cold	Yard Sign
Barbara Stevens		123 Beach Sand Lane		Sales	Don Faybrick	77			Pending	Warm	Trade Show
Kathlyn Ambrose		180 Rosebury Court	(440) 247-5602	Sales	Bernie Booth	33			In-Progress	HOT	Yard Sign
Maureen Glaser		623 Bayshore Parkway	(516) 555-1212	Sales	Bernie Booth	421			Sold	HOT	Self-Generated
Johnson, Carolyn		321 Main	(800) 555-1000	Sales	Sean Wyman	167			New	HOT	Customer Refe...
Roxane Blakeley	Burger Basement Bar	42515 Ford Road	(734) 555-3897	Sales	ADI Testing	27			Pending	HOT	Customer Refe...
Smith, David		1234 Joy Road	(234) 666-8888	Sales	Don Faybrick	6			Lock	Warm	Inbarcat
Barkley Wiggins	Wagging Tales Pet Spa	458 Canton Center ...		Sales	Bernie Booth	2.52...			New	Warm	Service Techni...

Show Inactive
 Show Company Name

Number of Prospects 20

When the prospect record is edited, a reference appears noting the service ticket number which generated the lead. The technician on the service ticket is automatically named as the salesperson for this prospect as a default. This can be changed to another salesperson if needed.

Edit Prospect - Barkley Wiggins

Prospect
 Wagging Tales Pet Spa
 Barkley Wiggins
 458 Canton Center Road
 Canton, MI 48187
 Source: Service Technician
 Status: New
 Sales Dept: Sales
 Salesperson: Bernie Booth
 Follow Up
 # Days Open: 2.52669988425623

Prospect Entry
Existing Customer (388)
 Residential Commercial
 Entered By: Administrator, 10/16/2015
 Company: Wagging Tales Pet Spa
 Name: Barkley Wiggins
 Title:
 Address: 458 Canton Center Road, Canton, MI 48187
 Status: New
 Pri. Source: Service Technician
 Sec. Source:
 Re-Flag
 Resolution:
 Comments:
 Inactive
 Apply
 Service Ticket #3598

Information from the Service Setup Table (see SedonaSetup Table – Service Setup) automatically populates into the screen.

Edit Prospect - Barkley Wiggins

Prospect

Wagging Tales Pet Spa
Barkley Wiggins
458 Canton Center Road
Canton, MI 48187

Source: Service Technician
Status: New
Sales Dept: Sales
Salesperson: Bernie Booth
Follow Up:
Days Open: 2.52669988425623

Prospect Entry

Existing Customer (388)

Residential Commercial

Company: Wagging Tales Pet Spa
Name: Barkley Wiggins
Title:
Address...: 458 Canton Center Road
Canton, MI 48187

Status: New

Pri. Source: Service Technician
Sec. Source:
 Re-Flag

Entered By: Administrator, 10/16/2015

Master Account:
Temperature: Warm
Phone 1:
Phone 2:
Mobile:
Pager:
Fax:
Email:

Sales Department: Sales
Salesperson: Bernie Booth
2nd Salesperson:
Next Follow Up:
Resolution Date:

Resolution:
Comments:

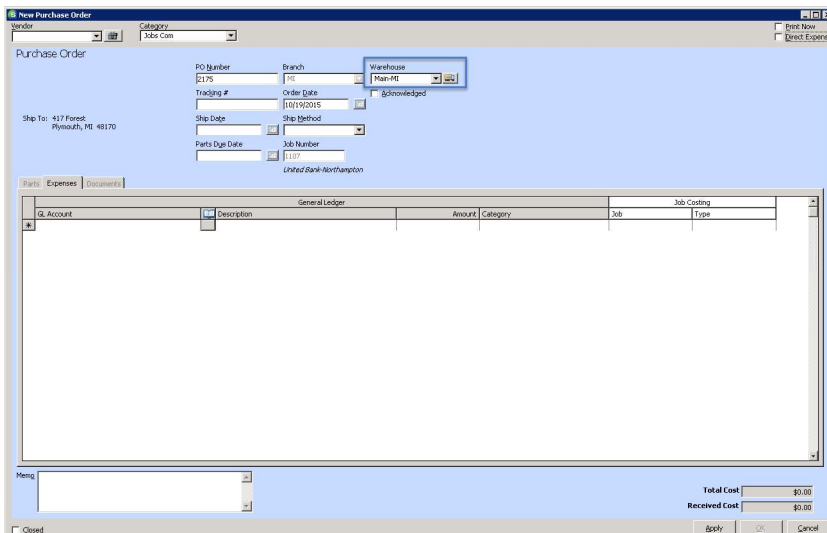
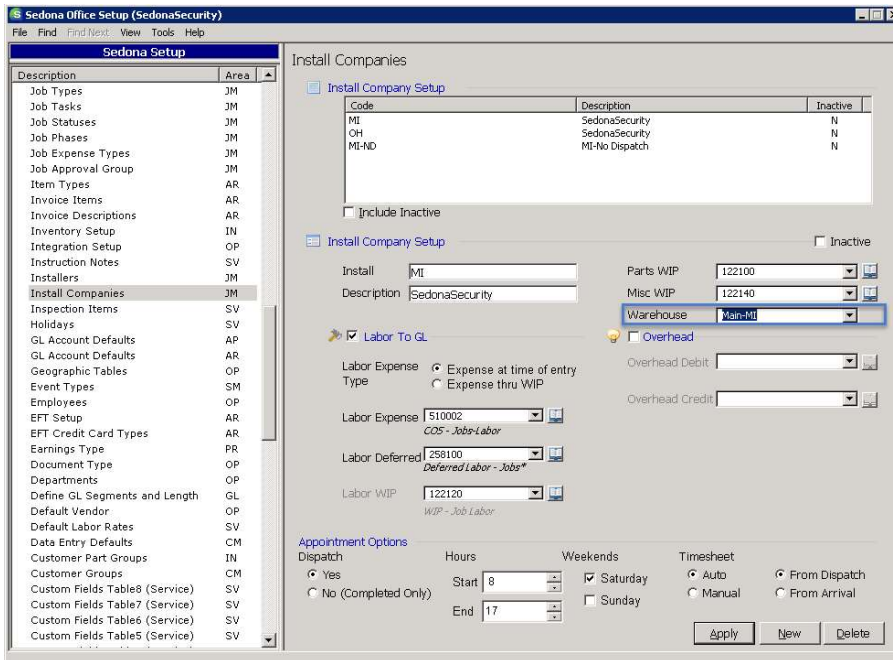
Inactive **Apply**

Service Ticket #3598

SedonaSetup

Install Company

A new warehouse field has been added to the install company table. The warehouse associated with the installation company will be the default warehouse selected on all purchase orders created from within a job that are not direct expensed.



Resolution Codes

The resolution code table has been updated to enable a prospect to be automatically created in the Sales Management module based on a resolution code. In the example below, in the course of a routine inspection of a system, the customer indicated interest in having an add-on to their system. By using the resolution code indicated on the inspection ticket, when the inspection ticket is closed, the customer is added to the prospect queue.

Sedona Office Setup (SedonaSecurity)

File Find Find Next View Tools Help

Sedona Setup

Description	Area
Statement Rules	AR
Signal Types	CS
Shipping Methods	AP
Setup Processing	AP
Setup Processing	AR
Setup Processing	JM
Setup Defaults	SV
Service Ticket Message	SV
Service Levels	SV
Service Companies	SV
Sedona Modules	OP
Scheduling and Appointments	SV
Sales Resolution Codes	SM
Sales Managers	SM
Sales Items	SM
Sales Departments	SM
Sales Department Maintenance	SM
Routes	SV
RMR Reasons	CM
RMR Escalations	CM
Resolution Codes	SV
Quote Types	SM
Product Line	IN
Problem Codes	SV
Printer Setup	OP
Prevailing Wages	JM
Payroll Setup	PR
Payment Methods	CM
Part Labor Unit Desc	IN
Panel Types	SV
Open Current Accounting Period	GL
Note Type	OP
Material Handlers	IN
Manufacturer	IN
Lead Sources	SM
Late Fee Rules	AR

Resolution

Resolutions

Resolution	Description	Billable	Prospect	Inactive
1 Add	Add Equipment	Y	N	N
2 Clean	Clean Equipment	Y	N	N
3 Repair	Repair Equipment	Y	N	N
4 Replace	Replace Equipment	Y	N	N
Clock Out	Ticket was clocked-out	N	N	N
Code Changes-B	Code Changes Completed-Billable	Y	N	N
Code Changes-NC	Code Changes-No Charge	N	N	N
Cust Cancel	Customer Cancelled prior to Appt Date	N	N	N
Go Back	Go Back Required	N	N	N
Insp Comp.	Inspection Completed	Y	N	N
Insp Complete - Prospect	Insp Complete - Prospect	Y	Y	N
Insp Decl.-Billable	Inspection Declined-Billable	Y	N	N
Insp Decl-Non-Billable	Insp Declined Non-Billable	N	N	N
Insp In Progress	Insp In Progress	Y	N	N
No Show	No Show	Y	N	N
Site Survey	Site Survey Complete	Y	N	N
Sys Restore	Sys Restore in Central Station	N	N	N
Void	Void	N	N	N
Warranty	Warranty	N	N	N

Include Inactive

Resolution Edit

Resolution Code:

Description:

Billable:

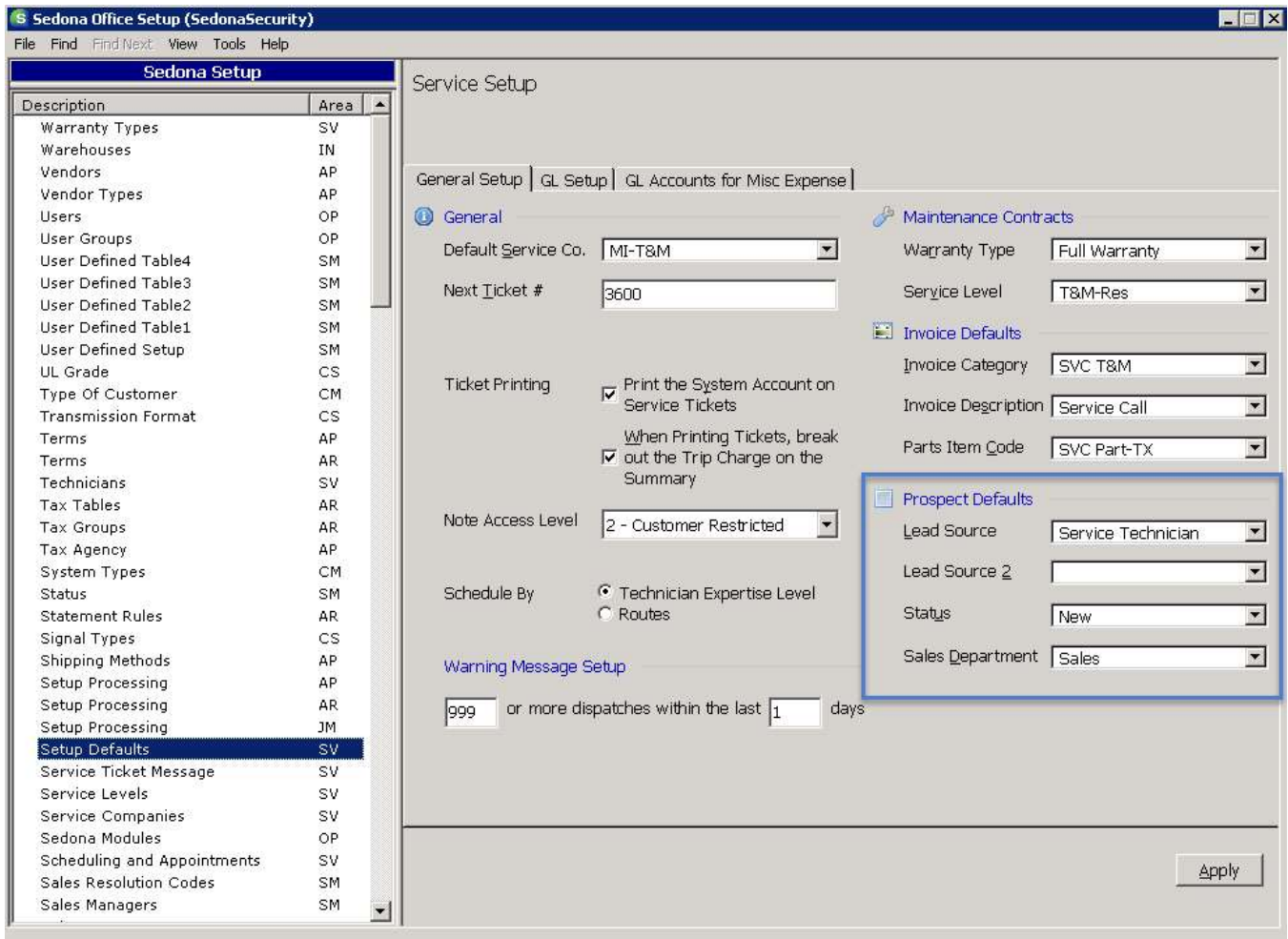
Create Prospect:

Inactive:

Apply New Delete

Service Setup

The Setup Defaults SV table within SedonaSetup has been modified to add a section for Prospect Defaults. When a prospect is added to the Sales Management module as the result of closure of a service or inspection ticket that is marked to create a new prospect, the information in this section will automatically populate in the prospect record.



User Groups

A new permission entitled “Edit Costs on Purchase Orders” has been added to the Accounts Payable permissions in the user group table. This permission must be given to users who will need to edit the prices on purchases orders after the purchase order has been initially saved. Users who do not have this permission will not have access to add new expenses, new parts or, if using the ADI Integration, the price check button.

Sedona Office Setup (SedonaSecurity)

File Find Find Next View Tools Help

Sedona Setup

Description	Area
Vendors	AP
Vendor Types	AP
Users	OP
User Groups	OP
User Defined Table4	SM
User Defined Table3	SM
User Defined Table2	SM
User Defined Table1	SM
User Defined Setup	SM
UL Grade	CS
Type Of Customer	CM
Transmission Format	CS
Terms	AP
Terms	AR
Technicians	SV
Tax Tables	AR
Tax Groups	AR
Tax Agency	AP
System Types	CM
Status	SM
Statement Rules	AR
Signal Types	CS
Shipping Methods	AP
Setup Processing	AP
Setup Processing	AR
Setup Processing	JM
Setup Defaults	SV
Service Ticket Message	SV
Service Levels	SV
Service Companies	SV
Sedona Modules	OP
Scheduling and Appointments	SV
Sales Resolution Codes	SM
Sales Managers	SM
Sales Items	SM
Sales Departments	SM

User Groups

User Groups

Group	Description	Level	Credit Limit
Accounting Clerk	Accounting Clerk	2	\$5,000.00
Admin	Admin	3	\$100.00
Administrator	Administrator	3	\$10,000.00
AP QQuery Only	AP QQuery Only	3	\$0.00
Data Entry Job	Data Entry Job	1	\$1.00
Dealers	Dealers	2	\$0.00
Dealers View	Dealers View with Notes	1	\$0.00
Inventory Clerk	Inventory Clerk	2	\$0.00
Manager	Manager	3	\$1,000.00

Include Inactive

User Group Edit Inactive

Code	Description	Level	Credit Memo Limit
Administrator	Administrator	3	\$10,000.00

Application Access | Report Access

Access	Module
<input checked="" type="checkbox"/> Edit Existing Transactions	AP
<input checked="" type="checkbox"/> ADI Integration	AP
<input checked="" type="checkbox"/> Vendor Custom Fields	AP
<input checked="" type="checkbox"/> Vendor Documents	AP
<input type="checkbox"/> View Only Access for Checks	AP
<input checked="" type="checkbox"/> Edit Vendor Notes	AP
<input checked="" type="checkbox"/> Delete Vendor Notes	AP
<input checked="" type="checkbox"/> Access to Secure Vendors	AP
<input checked="" type="checkbox"/> Override Expense Type	AP
<input type="checkbox"/> Read Only Vendor Access	AP
<input type="checkbox"/> Hide Vendor Social Security No	AP
<input checked="" type="checkbox"/> Edit Costs on Purchase Orders	AP
<input type="checkbox"/> Inventory	IN

Print Apply New Delete

Application Corrections

Accounts Payable

Credit Memos

Reported Issue: A runtime error was received when a new vendor credit memo was being created while another one was open and minimized. This issue has been corrected.

Purchase Orders

Reported Issue: When multiple line items for the same part were entered onto a PO, and the user clicked on Apply before clicking the OK button, the PO looked correct on the screen. When the PO was re-opened to edit, however, the first line of the multiple part had been deleted. This issue has been corrected.

Vendors

Reported Issue: When a new vendor was created with an address using the country of China, an error message appeared when the province was entered on the address screen. This issue has been corrected.

Accounts Receivable

EFT Processing

Reported Issue: When a batch was returned from Forte, and the user looked in Submitted Transactions, none of the files returned by Forte were marked as having been returned with a Y in the Returned column. This issue has been corrected.

Miscellaneous Invoice

Reported Issue: Add two non-recurring items onto a miscellaneous invoice. Place the cursor on the second line and press delete. Both line items were deleted, and a run-time error appeared. This issue has been corrected.

Payment Processing

Reported Issue: Reverse credit card transactions came into a payment batch with a negative dollar amount. If the transaction was opened in payment processing, and the user pressed the Save button, the total amount recorded as entered for the batch added the negative transaction to the total of the batch instead of subtracting it. This issue has been corrected.

Statements

Reported Issue: Statements that were printed using the Bill To address option did not have credits shown on the statement. This issue has been corrected.

Client Management

Print Statement

Reported Issue: When a statement was being printed for an individual customer, and the user did not select Site Totals from the Print Preferences menu, the site totals printed on the statement. This issue has been resolved.

Inventory

Transferring Parts

Reported Issue: Parts are added to the transfer request list. Click on Save but do not Save/Receive into a warehouse. Add another part to the request list. When the recipient of the parts clicked on Receive, the part that was added after the first save appeared multiple times. This issue has been resolved.

Reported Issue: If a user selected "For Job/Ticket" but failed to enter the number of a job or service ticket, a Run-time Error 13 appeared and closed SedonaOffice. This issue has been resolved.

Reported Issue: Sorting the transfer list by transfer # caused the numbers to convert into dates in the year 1900. This issue has been resolved.

Jobs

Billing

Reported Issue: A "Runtime Error 5" was received when trying to create an invoice from the job billing queue for a customers that had a checkmark in the Customer Information section "Bill This Sub To Master" but who were not subaccounts of a Master Account. This issue has been resolved.

Closing A Job

Reported Issue: A "3201 Either BOF or EOF" error message was received when attempting to close a job. Custom fields either were defined within the job or at one time had been defined and since removed from the Custom Job Setup table. This issue has been resolved.

Commissions

Reported Issue: When a gross profit commission was assigned to a salesperson on a job that had a loss, a negative commission was created instead of no commission. This issue has been resolved.

Point of Sale

Returning Items Paid by Credit Card

Reported Issue: When an item was returned which had been paid by a credit card, the credit went back onto the credit card as designed. The next sale item, however, processed as a credit card return. This issue has been resolved.

Reports

GL Register Entries

Reported Issue: The ending balance was the amount of the last transaction entered instead of the balance on the account on the last day of the range of dates chosen. This issue has been corrected.

Receipt of Goods

Reported Issue: When the same start and end dates were chosen as the range (e.g. looking for activity on only one day), the report appeared blank with the date 12/30/1899. This issue has been corrected.

Taxable/Non-Taxable Sales Report

Reported Issue: The full name of the city/county was being truncated due to the size of the field. This issue has been corrected.

Service

Appointments

Reported Issue: When an appointment had not been resolved by the technician prior to invoicing the ticket, Sedona would not allow the ticket to be closed. This issue has been corrected.

Ticket Type

Reported Issue: Under specific circumstances, the label given to a Vendor Inspection ticket was incorrectly given the name Vendor Service. This issue has been corrected.