SedonaOffice Release Notes

October 2025, Updated November 2025

Versions 6.2.0.21, Rev 2, and Rev 3

Contents

SedonaOffice 6.2.0.21 Rev 3 Update

In v6.2.0.21 Vendors - Applying a payment error about accounting period closed, but it isn't [00148203, 149044]

In a recent update, applying credits that were in a closed accounting period caused an error saying that the payment was in a closed accounting period.

This happened because of a fix to the SQL script APCredit_UPD.

To fix this, we created a new stored procedure called APCredit_FileOneVendor_UPD that only updates the Amount_Used field in the AP_Credit table. It does not need to make changes to the register, which fixes the issue and allows the credit to be applied properly.

SedonaOffice 6.2.0.21 Rev 2 Update

This correction is for the SedonaOffice 6.2.0.21 Rev 2 update.

Some recent deposits were incorrectly added to prior batches [00147139]

This issue was caused because Forte is reusing funding IDs that are supposed to be unique. To resolve this issue, we are making the funding batch name unique by including the effective date of the funding (as provided by Forte) in the name. Existing batch names will now have an underscore with four characters for the year, two characters for the month, and two characters for the date appended to them like this: _YYYYMMDD

To account for the longer batch name, we changed the length of these database fields:

- AR_ACH table Batch_Code field
- AR_ACH table Previous_Batch_Code field
- AR_ACH_Batch table Batch_Code field

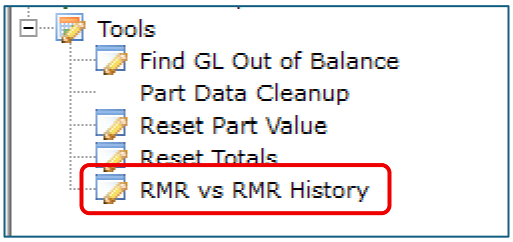
Because the new funding batch name will take effect immediately upon updating to SedonaOffice 6.2.0.21 Rev 2, there will be a short period of time where two funding batches could exist for the same physical Forte funding. If a funding batch was created before installing the update, such as 190283_FNDACHD-1004-0D422, fundings retrieved after the update will have the date appended to the batch name, such as 190283_FNDACHD-1004-0D422_20251024. Funding settlements not already processed will end up in the new funding batch while previously processed (prior to the software update) funding settlements will remain in the old funding batch.

This will only happen when unprocessed funding settlements for the same funding ID straddle the point at which the software update was applied - some processed before and some processed after. This situation will resolve itself as fundings processed prior to the update will not be used as they are completed and new batch names all have the date appended.

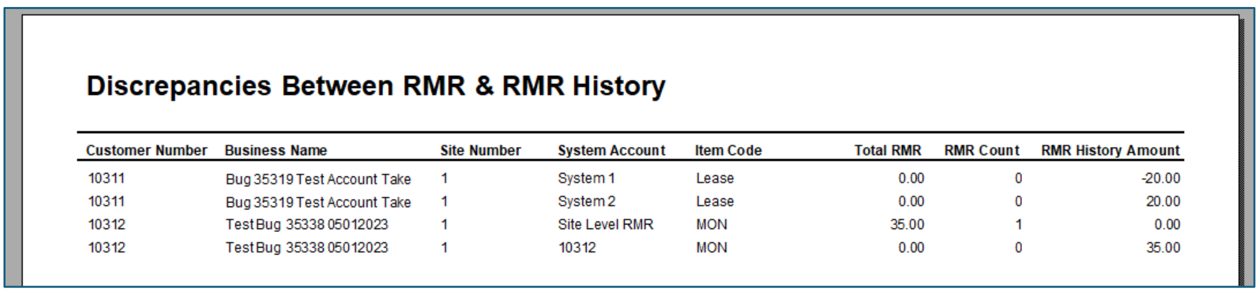
Enhancements/Features (for 6.2.0.21)

New Report Highlighting Discrepancies Between RMR and RMR History

We added a report for users to find any discrepancies between recurring and recurring history. This report highlights where actual recurring on a customer account is no longer synchronized with totals in recurring history for customers. This new report is under Tools and is called RMR vs RMR History.



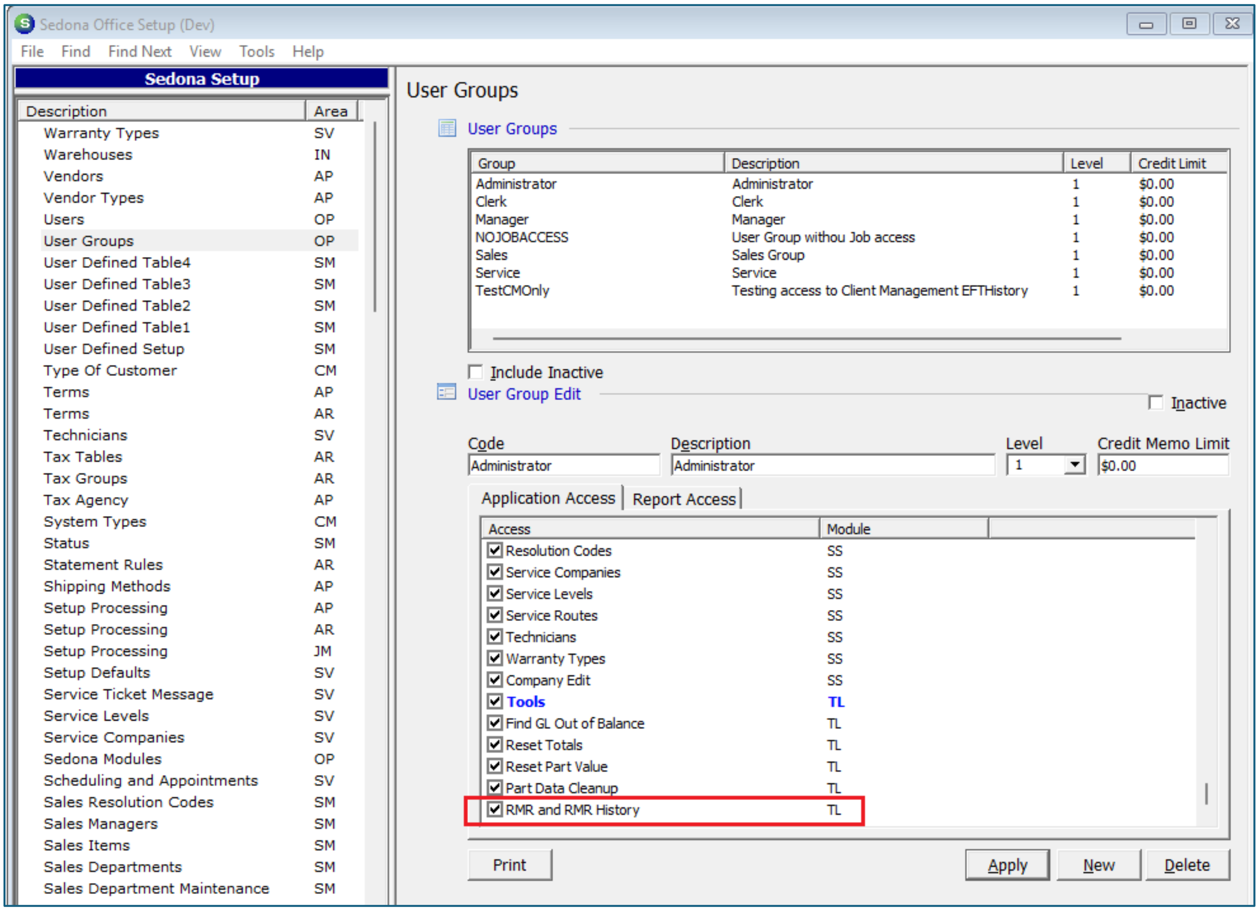
Example report:



Discrepancies Between RMR & RMR History

Customer Number	Business Name	Site Number	System Account	Item Code	Total RMR	RMR Count	RMR History Amount
10311	Bug 35319 Test Account Take	1	System 1	Lease	0.00	0	-20.00
10311	Bug 35319 Test Account Take	1	System 2	Lease	0.00	0	20.00
10312	Test Bug 35338 05012023	1	Site Level RMR	MON	35.00	1	0.00
10312	Test Bug 35338 05012023	1	10312	MON	0.00	0	35.00

To see this menu and be able to run the report, an administrator needs to give users access:



Changed Verizon Connect Integration to use POST to Update Work Order Status [106275, 102426]

For the Verizon Connect integration, we removed the work order status from the PUT call and are now sending work order status updates in a POST call.

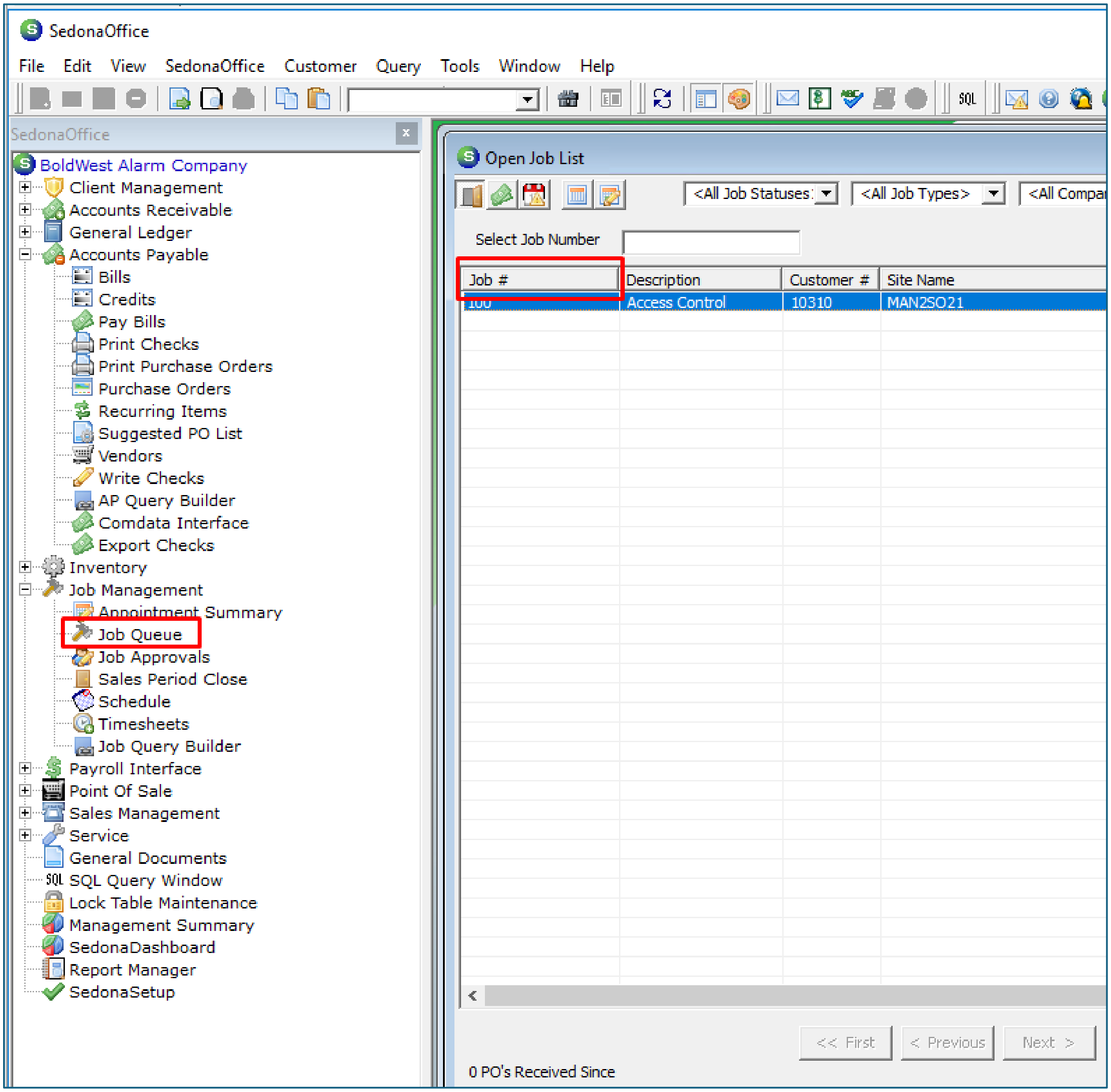
Note: The status may not update at the exact same time in SedonaOffice and VerizonConnect due to SedonaOffice sending updates in batches every 5 minutes instead of real time.

GL Unlocks More Quickly

When a user adds or updates a payment to a batch, the database locks are released sooner, so other users can work with the General Ledger without waiting for the payment to complete.

Job Number Column Widened for Open Job List

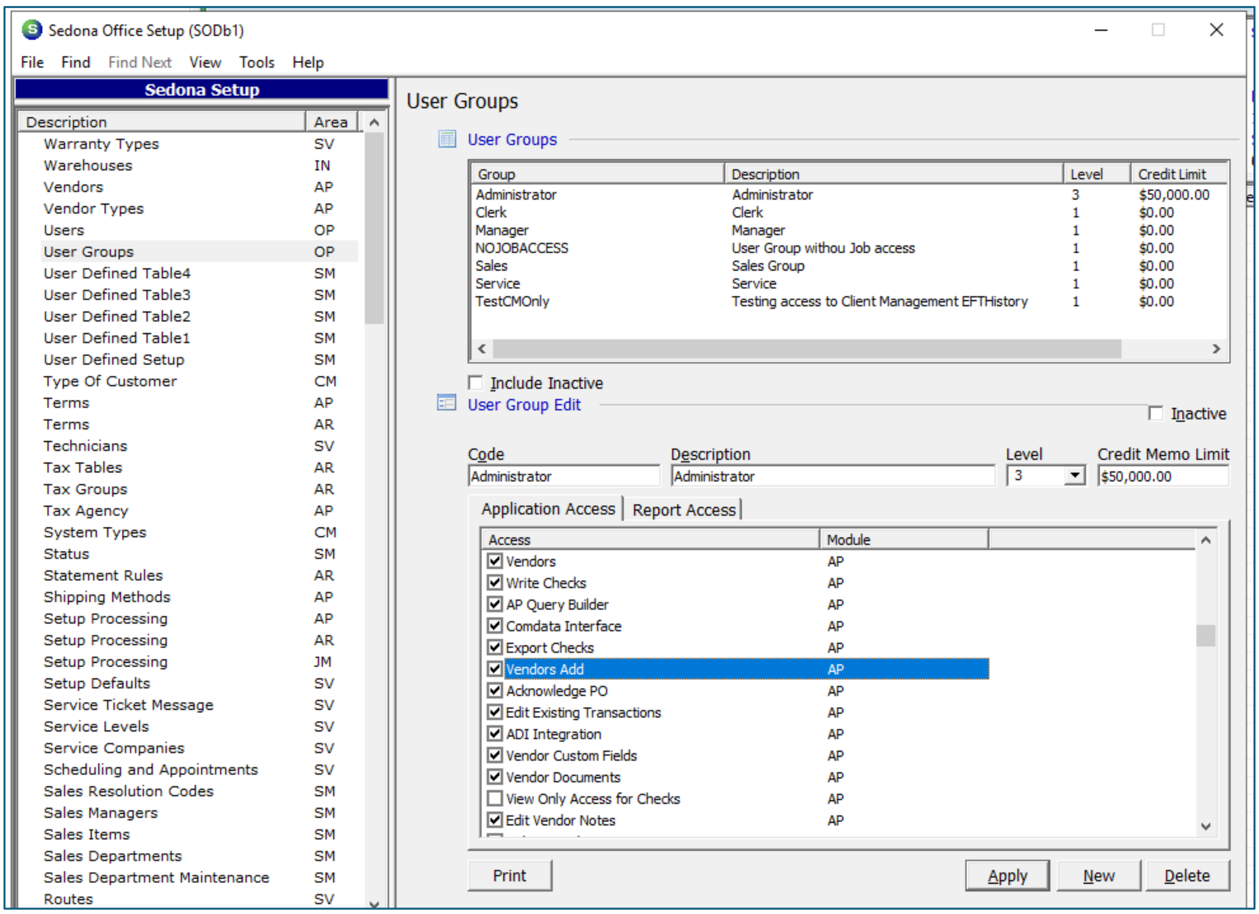
On the Open Job List, we made the Job # column wider. It now shows the full 25 character job number, so users do not need to resize this column each time they open this form.



New Vendor Add Permission

There is a new user permission for adding vendors called "Vendor Add". This allows limiting users who can add new vendors but still gives them the ability to edit existing vendors.

This is a new user group permission. Navigate to SedonaSetup > OP > User Groups and select a user group to see the details. Under the AP module section, on the Application Access tab, is the new Vendor Add permission.



Users with this permission will see the New Vendor button on Accounts Payable > Vendors and SedonaSetup > Vendors.

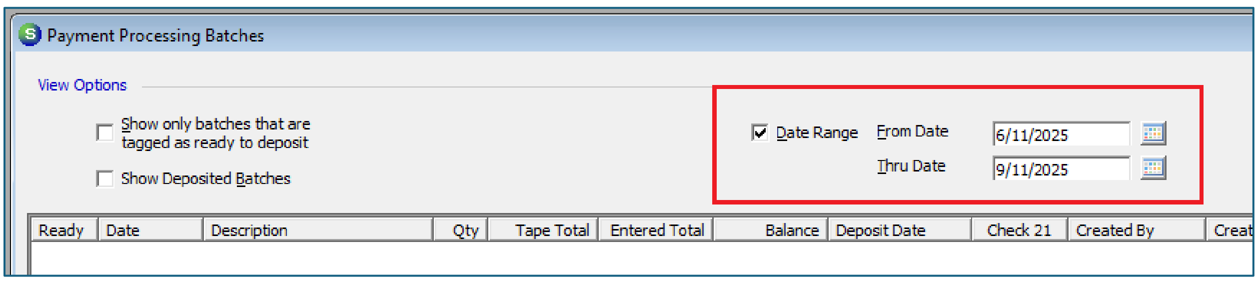
If a User Group had "Vendors" selected prior to updating to 6.2.0.21, then the new "Vendor Add" Permission will be selected by default. That will allow all users in that group to Continue to Add Vendors or Edit Vendors after the update.

If "Vendors" permission was not selected for a User Group prior to updating to 6.2.0.21, then the new "Vendor Add" Permission will not default to selected (it will be cleared).

If there are users who should not be able to add vendors but are in an existing user group that had the Vendors permission prior to the update, then create a new user group for those users and only select Vendors and not Vendors Add.

Payment Processing Grid Defaults to 3 Months

The Payment Processing grid took a long time to load when there were many batches. We are now limiting the number of batches shown by default to the previous three months so the grid loads more quickly.



Users can change this date range to see batches older than three months.

Increased Length of AR Invoice Memo

We increased the memo length to hold 4,000+ characters in the following forms:

- Cycle Invoices
- Batch Email Invoices
- AR Rate Increase
- Service Ticket
- Job Invoice Billing
- Job Task invoice

In addition, we updated some stored procedures for this change. Refer to the list of updated stored procedures.

Application Corrections (for 6.2.0.21)

Unapplied cash applied that was never received [97487]

The screen was displaying an outdated state Credit Amount because there was no refresh or validation from the database to check if the amount was still available to apply.

We are now retrieving the credit amount from the database and updating the Credit Amount text box accordingly. This ensures that all subsequent validations are applied correctly when users click the Save button.

Adjust inventory stock adjustment to 50 characters in the memo field [117864]

SedonaOffice gave an error about a line truncation when entering a memo field in Inventory Stock Adjustment.

We changed the Inventory_Adjustment stored procedure to limit the memo field to 50 characters when it is passed to Register_Add stored procedure. We also changed the Part_Journal_ADD stored procedure to truncate the memo field to 50 characters when it inserts a record into the IN_Journal table.

Vendor return for credit issue with invoice date display [128849]

When creating a vendor credit from a return, the Invoice Date field automatically populated with 12/30/1899.

To fix this, we are setting the Invoice Date to blank.

EFT processing: The wrong response code is being pushed into our billing software for rejected ACH [00131458]

We corrected this to accommodate the capture authorized deposit check failure and to process Forte communication properly.

AR setup doesn't track changes to selected invoice item and desc properly [136295]

If there were two AR setup fields linked to a specific invoice item and invoice description, editing the invoice item and invoice description did not change the AR setup fields.

We fixed this so that when users change a linked invoice and description, the AR setup fields are properly updated.

New example of Sedona and Dex showing different status [00138130]

We fixed this issue with another correction: EFT processing: The wrong response code is being pushed into our billing software for rejected ACH [00131458].

Registration code- SedonaBatch email [00138559, 00143501]

The Registration Code was not showing in the Email Invoice Template Bridgestone Standard even though the registration code was checked to be shown.

We added the Registration Code to the Email Invoice Template Bridgestone Standard and Advanced.

Increase shipping method descriptions in ADI integration

For dealers using the ADI integration, we changed the sizes of two fields: shipping_method_Code is now 50 characters and adi_shipmethod_description is now 39 characters.

Orphaned transactions with no checks and does not show as submitted but settled in Forte [00144166]

Users reported some transactions were sent to Forte, got approved, and settled in Forte but in SedonaOffice the transactions appeared as not sent with Response_code = "A01" but trans_status = "Orphaned".

The ACH transactions were created by a call to /api/paymentmerchant/captureauthorizedtransaction. They were orphaned because of a SQL deadlock while creating the deposit check. They failed to come out of orphaned status because SedonaOffice was incorrectly parsing Forte's response from their "get transaction by Id" API call.

To resolve this, we made these changes:

1. We corrected the SedonaOffice handling of Forte's "get transaction by Id" response to know if the transaction was processed by Forte.
2. The exact cause of the SQL deadlock could not be determined. To minimize this possibility, we are preventing locks where locks are not required.

Accounts Payable

Memos on checks not printing complete [51647]

Going to Accounts Payable > Print Checks, selecting a vendor that has open bills, opening a check, and when updating the memo line on the check, it cut off the text after 25 characters. (This does not affect new checks via the write checks menu item.)

We changed the memo length to 109 characters instead of 25 characters.

Accounts Receivable

Duplicate payment batch- Run Time Error 5 [00077884]

When creating multiple new deposits from a batch and the same deposit, it caused the deposit to be entered as a duplicate and all but one caused an error when opening them.

We added a verification that the batch has not been processed yet right before it is processed. If it has already been processed, a message appears telling users that the batch has already been posted and the grid refreshes.

Cycle billing- no AR GL account required [00100746]

We added a validation check for a blank (empty) AR Account on the Cycle Invoice Process screen. Users cannot post a cycle invoice without a value in the AR Account field.

Issues with the SedonaOffice deferred income reporting [106327]

The RMR Billing via Invoice and Cycle Invoice had a different amount for the first month. The difference in amount was added to the last month.

The cycle invoice amount now matches the invoice amount.

Bill to e-mail too long [00133337, 00138119]

Customers were unable to save email as it was too long in Customer Bill To section.

We changed the email maximum size to 256 characters (from 50). We also changed the email for the Customer Site Contact Email to 256 characters.

Client Management

Open credits report not recognizing a voided unapplied cash EFT transaction [00070948, 111174]

The Open Credit/Unapplied Cash report now excludes voided unapplied cash.

Error– "Adding this record will result in a duplicate entry" when creating a new system [75380]

When users created a new system and clicked on the Central Station Data tracking and clicked save, there was an error that adding this record would result in a duplicate entry (AR_Customer_ID=0). The problem was caused by the new system not having an ID yet and was set to 0 until the system was saved. When the Central Station was trying to save, there was no System ID and it would try to save it to ID 0, which was incorrect.

To fix this, we moved the save point from the Central Station form to the System form. If a new System is created it will not be saved after the Central Station form is filled out and save is clicked, instead it will save the data once the system is saved so that the new system ID can be used.

Since after clicking save on the Central Station form, a user could cancel creating a new system, we removed the edit log for when a new system is saving the central station. Instead, the edit log will use the system save information to create an edit log entry.

Also, there was an additional issue: if an error occurred in the Central Station form while saving to the database, the transaction was never properly rolled back and would cause an open database connection until SedonaOffice was shut down. We added a rollback on the database in the error catching if it is connected to the database at the time of the crash.

Customer snapshot function not working if more than one CC has auto process on [00094692]

When multiple credit cards have recurring checked it caused the Customer Snapshot to appear blank.

We fixed the issue that was causing the customer snapshot to appear blank. We fixed the issue for bank accounts as well.

When selecting to update the RMR bill to when the subaccount bill to is changed - the RMR does not update all information correctly [00118766]

When users select the bill to for a site instead of a master account and choose yes when prompted to update the recurring for the site to the new bill to information, The system now saves the site record with the new bill to information. The bill to on the recurring record now shows the correct bill-to for the site account listed on the site instead of the master account bill to. The Receivable to Master checkbox will not be selected.

When using sub item of on recurring, selecting receivable to master removes sub item of [124771]

When a Recurring (new or existing) had Sub Item Of selected, and the Receivable to Master was selected, the Sub Item Of was Removed.

We fixed this to stop removing Sub Items Of when the Receivable to Master is selected.

Job Management

Issues with credit request for wrong customer against retention invoice on job [70644]

When users tried to move an invoice off one customer to another customer through the credit request process, it did not work if the invoice was issued in the job and there was a retention.

To keep users from attempting to do this for job invoices, we are not allowing the Credit Request – Invoice Issued to Wrong Customer feature to be available for job invoices.

Job tasks list glitch [68780]

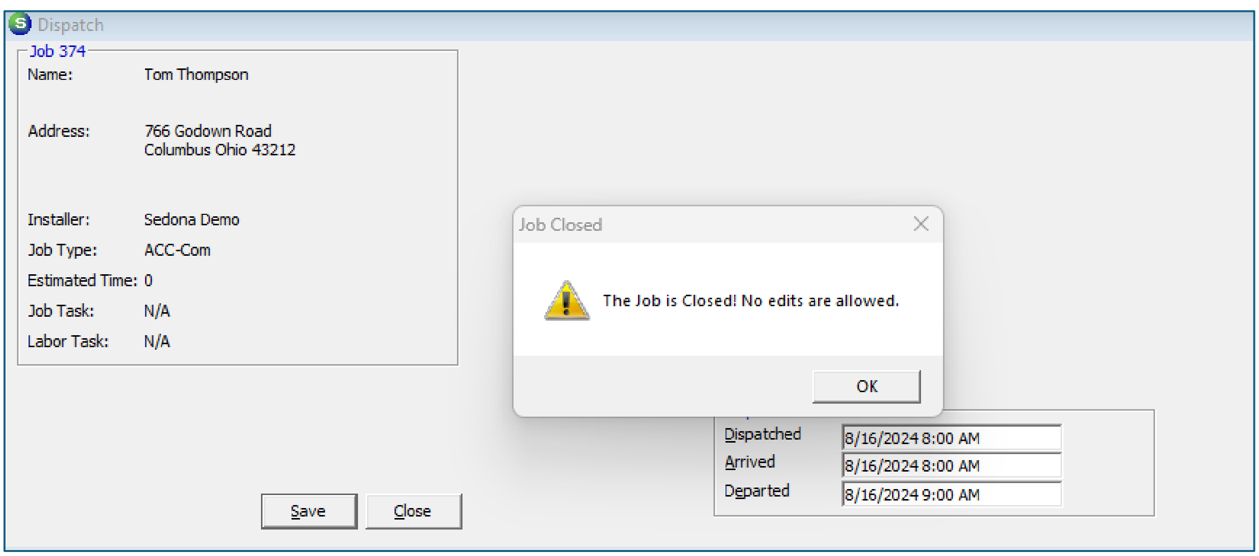
When removing a task, there was a 5 to 8 second delay for the screen to refresh. This was caused by each task being resaved as the sequence (Task number) was being updated and then saved.

To fix this, all tasks associated with a job are renumbered at once instead of looping and saving each one. This reduces the save time to less than 1 second.

Editing appointments on jobs/service tickets in closed accounting period affects Labor GL [00051181]

Users could change times on appointments when a ticket was closed. This caused changes to the Labor GL.

We added a check to the save button in dispatch appointment so that it no longer allows changes when a job is closed and the job type does not allow costing on closed job; then, the following message is shown:



Error opening change order job from master customer [61253]

We removed the change orders from the job selection list so that they are no longer listed. Users need to pick the normal job as they do with sub accounts.

Job management: deleting job entries that are incorrect [143874]

Users could not update or delete timesheets when the accounting period was open and the job was not closed. They had to click in and out of the timesheet to be able to delete it and had to add a new timesheet with the correct job task instead of updating the job task to the right one.

We fixed this issue so that users can change job tasks on timesheets without needing to delete the incorrect one and create a new one.

General Ledger

The posted GL transaction is not in balance [143739]

GL entries were unexpectedly being written with Primary_Register_Number = Register_Number. They were counted twice, causing the total to be out of balance.

To fix this, we modified the balance check stored procedure (Register_List_Balance_Check.sql) to ignore these entries when processing sub-entries (those with a primary register number) as they will be picked up during the processing of primary entries (those without a primary register number).

Inventory

When part at 0 qty and negative value needed to be set to 0 physical, it was not allowed [128770]

When a part had a quantity of 0 with a negative value, setting the quantity to 0 in a physical inventory count did not correct the value to 0.00; it left it negative.

We fixed this to update any parts that were set to 0 and had a quantity of 0 will also set the value to 0.

Report Manager

Open amount not calculated correctly on job open billing report [4604]

Credits were not applied to calculations for the Job Open Billing report.

We corrected the calculation in the report, so now credits for installs are now subtracted from the charges being shown.

Advanced deposit transaction is voided after its been approved, but the transaction is not removed from the open credit report [00065643]

Open Credit reports still showed voided Advanced Deposits.

We removed voided Advanced deposits from the report.

Cancellation report not pulling in all cancelled customers [75947]

We resolved an issue where the cancellation report and the cancellation queue were not matching.

Service

Inspection duplicates [00115775, 17163]

Duplicate Inspection records were being created. From the data provided to review this, one of the two duplicates would always have the Increment_Code_ID equal to 0. This seemed to cause the record to not appear on the screen or when refreshed.

To resolve this, we are verifying that the Increment_Code_ID being passed in is valid and present in the SS_Inspection_Increment_Code table.

We also added a log entry into the Update System when an invoice or task closes the job. At that point SedonaOffice either adds or updates the Inspection record for the job.

Question on technician schedules [124257]

Service company start and end dates were not shown as available in the technician schedules.

We added start and end dates to the technicians' schedules.

Setup

SedonaTree administration: lock table issue displaying the wrong lock user [00122412, 00129782, 00134467]

We corrected the messages to show the correct locking user.

Stored Procedures

<u>New Stored Procedures</u>

- Account_Get_Credit

Updated Stored Procedures

- ACH_Batch_Add
- ACH_Batch_Get
- ACH_Cycle
- ACH_Post
- ADI_Shipping_Method_Sync
- AR_Rate_Increase
- Accounting_Period_Date
- Advance_Deposit_ADD
- Auto_Customer_Invoice
- Auto_Invoice_Buffer
- Auto_Invoice_Header
- Auto_Logger_Customer_Invoice
- Auto_Rate_Increase_by_Customer_Recurring_Id
- Check_ADD
- Check_UPD
- Customer_Bill_ADD
- Customer_Contact_ADD
- Customer_Contact_UPD
- Cycle_ADD
- Cycle_Deferred_By_Cycle
- Cycle_Invoice_Add
- Cycle_UPD
- Deposit_Batch_ADD
- Deposit_Check_ADD2
- Deposit_Check_Detail_ADD
- Email_Invoice_GET
- Get_Account_Id
- Get_Branch_Id
- Get_Category_Id
- Get_Payment_Method_Id
- Inspection_ADD
- Inspection_UPD
- Inventory_Adjustment
- Invoice2_UPD
- Invoice_ADD

- Invoice_Description_UPD
- Invoice_UPD
- Item_UPD
- Job_Task_Renumber_Sequence
- Job_Timesheet_UPD
- Part_Journal_ADD
- Physical_Part_Release
- Posting_Start
- Rate_Increase_ADD
- Rate_Increase_Post
- Rate_Increase_UPD
- Register_ADD
- Register_AddTo_Amount
- Register_List_Balance_Check
- Register_Next
- Register_Offset2_ADD
- Register_Trigger_ADD
- SEFT_Get_ACH_Invoices

Database Tables

New Database Tables

None for this release

Updated Database Tables

- AP_Shipping_Method
- AR_Customer_Bill_Email
- AR_Customer_Contact
- AR_Customer_Site
- AR_Cycle
- AR_Invoice
- AR_Invoice_Buffer_Header
- AR_RMR_Tracking
- AR_Rate_Increase
- GL_Setup
- SS_Menu

Special Upgrade/Installation Instructions

If upgrading from a SedonaOffice version prior to 6.0, the following related updates are also required:

Legacy SedonaWeb 1.0 — Be aware that if your company uses Legacy SedonaWeb 1.0 (version 2.7.80 or earlier) with SedonaOffice version 6.2.0.8 or earlier, we recommend that you transition to using SedonaWeb 2.0. (Note: Legacy SedonaWeb 1.0 version 2.7.81 is compatible with SedonaOffice 6.2.0.9 or later.)

SedonaWeb/SedonaAPI 2.0 Setup — If your company uses the SedonaWeb/SedonaAPI 2.0 in any manner (Sales Automation, Time & Attendance, eForms, or the SedonaAPI for integrations such as the Manitou integration), IT will update your SedonaWeb/SedonaAPI version at the same time as your SedonaOffice version. This is to ensure compatibility with the Sales Automation module.

Performing Update — Once you have reviewed all the above information, and followed all preparation steps, contact SedonaOffice support. We will note on your account that you have received the Release Notes and are ready for update. SedonaOffice IT will then contact you to schedule your update.

To Use TLS 1.2 — Consider the following:

- All computers running SedonaOffice client should be on Windows 11; the server must be on Windows Server 2019 or later.
- TLS 1.2 must be the only TLS version enabled in the Registry. TLS 1.0 and TLS 1.1 must be disabled. Verify that they are disabled and that TLS 1.2 is enabled.
- The SQL Server must be set to force encryption.

Supported Environments

Minimum System Requirements

- Server is on Microsoft .NET 4.6.1
- If used, SedonaWeb/SedonaAPI 2.0 version 1.52.0 (or higher)