

App Support General Information - SedonaOffice 5x to 6x Upgrades [WIP]

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Customer's Upgrading from Sedona Office Client 5x to 6x will need the following to prepare.

Known Disclaimers/Notices - Please note the following regarding Existing & 3rd party integrations

- - Ensure you confirm any business critical integrations prior to upgrade
 - Customers utilizing WeSuite that wish to upgrade to 6.2x must notify WeSuite wesupport@wesuite.com to ensure continued functionality of their integrations
 - Customers utilizing OPT Events via SedonaSync must notify OPT Support@optbusinessservices.com to ensure continued functionality of OPT generated events
 - Customers utilizing both WeSuite and OPT Events via SedonaSync should confirm with both parties of any independent upgrades to ensure their respective continued functionality (this is specific to Crystal Reports)
 - Customers utilizing QuoteWerks must be advised that the latest QuoteWerks build v5.7 b2.40 is not compatible with Sedona Office. Subsequently all builds of QuoteWerks that no longer use pit files are impacted (those between April 2021 - current)
 - Customers utilizing SedonaWeb legacy 1.0 must also be upgraded to the latest version of SW which more security features regarding invoice, name, address, and exact match requirements. [This applies to both the latest version of SedonaWeb Legacy and SedonaWeb 2.0]
 - Customers should plan for upgrade & conversion SedonaWeb Accounts 1.0 to 2.0 [Requires Sales contact]
 - There is not safe a method to roll-back the Sedona Office database upgrades – All databases should be backedup prior to any data conversions or upgrades for review until all system functionality is satisfactorily resumed

Process Outline

- To be provided the full documentation on 6x payment processing
- PCI Compliance process
 - Pre Data Check to confirm no pending invoices to offset data or be lost in upgrade
 - Review - confirming data viability if any changes
 - Post Data Check after install confirming balances and accounting is as expected
- Scheduled Upgrade of Sedona Office Client 6.2.0.5 or latest version

- Customers using a version older than 5.7.0.99 need to be brought to that version then upgraded to 6.1.0.61 then to 6.2.0.5
- Customers on 5.7.0.99 need to be upgraded to 6.1.0.61 then to 6.2.0.5
- Training on Payment Processing if needed

If they also have Sedona Web 1.0 they will need to upgrade to SedonaWeb 2.0/API and have the latest version of Sedona Office

- Advisement on newest security features/invoice # and exact info match requirement for new SW account registration - special business case uses discussion
- Confirm if current server has resources to support Sedona Web 2.0 [Enterprise/ Self Hosted Only]
- Discussion on account conversion from SedonaWeb 1.0 to 2.0
- Decom of Sedona Web 1.0 to prevent any issues [may not be required if conversion can be automated]
- Install of Sedona Web 2.0
- Training on Sedona Web 2.0/API Use, credentials, etc
- Testing confirmation of account conversion in SedonaWeb

Planning

- ****NEW APR 7**** Confirm if the customer is using WeSuite - Per WeSuite upgrades to 6.2 require additional work to maintain functionality
- Confirm any contract updates or new offers to coincide with upgrade via Sales Channels
- Establish primary contact in professional services to field any issues during the multi-point upgrade to ensure coordination if any one resource is unavailable unexpectedly
- Resources identified for all steps
- Provide documentation on newest versions of SO Client and SedonaWeb 2.0
- An optional step if available is to demo functionality if available [There is not a way to roll back versions of SO]
- Once upgrade is completed and verified working they will be under normal support procedures and SLA -All issues should be tracked via SF Case for process improvement and tracking

****This ties heavily to the companies impacted by the issues with SedonaWeb 2.7.56 and older regarding WebPay Credit Card Payments from Feb 2022****

Sample Case Reply ****Updated 4/7/22****

Good Day,

We have been working Forte support since the first week of March. They are unable to restore functionality that affects credit card payments which the code in your version of SedonaWeb is utilizing. In the interim Forte Development is still reviewing items such as possible issues with tokenization of credit cards, TLS versions, and other Server responses. The Master ticket # with Forte is 738136 and we have provided them

the list of known SedonaWeb clients that are impacted. The only known workarounds are either for customers to call in and process the payment over the phone or Bank payments from SedonaWeb are still functional because they are routed back to the SO Client to be processed the next day as a batch. Since both the protocols and endpoints are working in the newer versions of SedonaWeb which require the Sedona Office Client to be updated, our leadership is currently engaged in organizing the necessary resources to streamline the upgrade for the customers that are impacted. More details will be shared very soon, and a coordinator will reach back out to review the process directly with you on next steps.

-Sedona Support

Sample Verbiage:

Greetings,

In February 2022 an unknown change in Forte Servers was sunset/deprecated. This functionality is used specifically in versions of SedonaWeb prior to mid-2018 and has resulted in customers not being able to process SedonaWeb Credit Card payments online, while leaving the Client App payment processing and Web based ACH/Bank payments intact. Since the first week of March BoldGroup has been engaged with CSG Forte support providing examples of these failed payments and working with their technicians in hopes that Forte would have the ability to restore this functionality.

An official communication from CSG Forte has not yet been announced on their ability to reinstate this functionality. This issue has exceeded the 30 day mark and our leadership is currently engaged in organizing the necessary resources to streamline the upgrade process for the customers that are impacted. More details will be shared very soon, and a coordinator will reach back out to review the process directly with you on next steps.