

Sebis Integration Process for SedonaOffice

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Purpose

Sebis is a third-party integration that provides a service for physical invoice printing and mailing services to Bold Group customers. This document covers the integration for SedonaOffice only.

High-level summary of the process:

- Bold Group PM will inform Sebis contact of the customer project and go-live dates
- The customer will request credentials from Sebis
 - Credentials require a 2-week lead time
- Bold Group will setup or "install" the link to Sebis using the customer credentials and each user who will send Sebis an invoice file will have a workstation setup
- Training is delivered pre-go live to send a sample file to Sebis to complete their setup
- Sebis will setup their invoice formats with logos
- Post-go live, a short follow-up training will occur with the live database to send an actual file to Sebis

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Sebis Contact Information

The main contact for Sebis is Dino Tianello. He can assist with any scheduling or project issues:

Dino Tianello

dtianello@sebis.com

330-289-4634

A technician for Sebis will do the actual setup on their end. The website for Access Direct is <https://www.sebis.com/access/>. Sebis will provide the customer with the username/password.

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Project Process

The following tasks should be added/updated to the project plan for Sebis and all steps followed:

1. Inform Sebis of Customer Project

- a. Include go-live date if in conjunction with SedonaOffice product implementation
- b. For add on module implementation - go live date will be determined on receipt of credentials and when training/installation can be scheduled.
- c. Request number and name of users that will be sending invoice file to Sebis
 - i. Each user will require Sebis setup on their workstation

2. Send Sebis Instructions to the Customer

- a. Timing:
 - i. New SedonaOffice implementation - Sebis task will drive timing
 - i. can use email template 'Sebis Module for SedonaOffice' but modifications will be required
 - ii. Add On Module to existing SedonaOffice customer as kick off email
 - i. use email template 'Sebis Module for SedonaOffice'
 - iii. The email template will also include instructions for customer to provide a list of users that will send the invoice file to Sebis. We require the user first and last name and email address for the installation on their workstation
- b. NOTE: Credentials are required 30 days prior to SedonaOffice product implementation go live and require a 2-week lead time to Sebis
 - i. FTP login will expire in 30 days and need to be reset if received too early
- c. Inform the customer they will need to request credentials
 - i. Send attached document: Sebis Integration for SedonaOffice Customer Credential Request Steps
 - i. includes information regarding data to have ready for Sebis resource

3. Confirm Sebis Credentials Received from Customer

- a. At Least one week prior to install date
- b. When credentials are received, add the following information to install task in Chatter:
 - i. Username:
 - ii. Password:
 - iii. Passive Mode should be checked
 - iv. Port 21
 - v. FTP site is <ftp.sebis.com>

4. Install Sebis

- a. For Sebis add on module install only - schedule once user listing and credentials are received
 - i. Note: FTP login will expire in 30 days if installed too early, try to schedule install/training/go live within 30 days.
- b. For SedonaOffice product implementation only:
 - i. Can be included in add-on module install task if necessary
 - ii. Should be scheduled for 30 days prior to go live
 - i. FTP login will expire in 30 days if installed too early
 - iii. Install on the sandbox database
- c. Install time: 30 min
- d. Make sure credentials have been included in Chatter for install

5. Setup Customer Users - can be done with installation if time permits

- a. Install time: 1.5hrs (This was for 7 users - may require more if additional users)
- b. Include user list in Chatter as attachment
- c. Tech will setup necessary items on individual workstations for all users that will send invoices to Sebis

6. Training - Sebis

- a. Session one: delivered pre-go live - Time: 1 hour
 - i. Trainer will provide a test run with multiple invoices to Sebis for setup testing
- b. Session two: delivered post-go live – Time: 30 minutes

7. RMR Runs

- a. First - Sebis will require extra time to test the initial RMR invoice run. Customers will need to provide this run at least one week prior to when they want the invoices to be mailed.
- b. Subsequent - Sebis requires 48 hours to mail invoices with a cut-off time of 12pm CST
 - i. Example - If the file is approved by the customer at 2pm on Tuesday, mailing would be Friday
 - ii. Sebis requires 72 hours if a new application or program update

8. Reprint Sebis to Live Database post go live (only if installed and tested on sandbox database)

- a. Can be added to task to reprint all add-on modules for new implementation go live

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Revision History

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7/7/23 - JMK revised to include different steps for add on to exiting SedonaOffice customer only vs include as a module in new SedonaOffice product implementation. Corrected Sebis contact email address. Added instructions for collecting usernames/email address for workstation install

4/4/2023 - JMK - added Step 7 to Project Process and updated step 6 for trainer test run information. Added Access Direct website info to Sebis contact info section.