

SedonaWeb Implementation Process

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Purpose

SedonaWeb provides a web portal for Bold Product users' customers to conveniently manage their accounts. It provides visibility to view and pay open invoices, submit service tickets, and manage service calls.

If the customer already has the SedonaCloud API, there is technically no installation, just an extension to the URL.

This document walks through the process for Project Managers (PM) to implement SedonaWeb.

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Process Overview

The following steps are required to implement SedonaWeb:

1. Verify SedonaOffice version is compatible
 - a. Yes – move to step 2
 - b. No – see [SedonaOffice Upgrade Implementation Process](#)
 - i. 5.7 or lower – Upgrade completion is required prior to installation Step 4
 - ii. 6.x or higher, add install time to step 4
2. Confirm API status
 - a. Included in the project quote?
 - i. Yes
 - i. Provide the customer with the appropriate preinstall checklists for installation based on where their data resides in step 3 Kick Off email

- i. Preinstall Checklist - SedonaWeb (Limited API) - On Prem
- ii. Preinstall Checklist - SedonaWeb (Limited API) - Cloud
- iii. Backup copies are available in [Implementation and Installation Forms](#)

ii. No

i. Confirm customer has API [API Information and Installation Process](#)

- i. No – inform sales API needs to be sold
- ii. Yes – move to step 5

3. Send Kick Off email

- a. Template: '[SedonaOffice Add On module - with Checklists Attachments](#)'
- b. Update fields in red
- c. Remove checklist items that do not apply

4. Schedule Installation

a. Combine the necessary estimated time for each of the install tasks required:

i. SedonaOffice Upgrade from 6.x only: 30 minutes

i. The customer will be down during this time

ii. API

i. Install

i. Hosted – 2 hours

ii. On Prem – 6 hours

ii. Upgrade – 30 min

b. Update the task Chatter to include all elements to be installed/upgraded

- c. Upload any preinstall checklists
 - d. For On Prem customers, schedule an Outlook appointment for the technician and the customer
 - e. The technician will install and provide the URL, username/password
5. Test the URL
- a. See [Locating the Website URL](#) section for more information
6. Provide website URL and user login information to the customer
- a. The website URL will be the same URL as the API with the database Prefix added to the end. See [Locating the Website URL](#) section for more information
 - b. Ask the customer to test the URL
7. Training
- a. Schedule training if sold
 - b. Estimated time: 1 hour
 - i. Schedule for time sold in quote
8. Provide the customer with the SedonaWeb Customer Login Documentation document (included in files attached to this article). The customer can update this document with their portal information and contact information and share it with their customers for registering for portal use
- a. Note - at this time the SedonaOffice invoice does NOT include the registration number at the bottom of the email. It can be found in the customer's account information under the Registration Code field.
9. Send Project Completion Request
10. Close Project

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Locating the Website URL

SedonaWeb is 'installed' with the API. Customers who purchase SedonaWeb are given both the API URL and the SedonaWeb URL. To locate the URLs, follow the steps below:

1. Open the customer's API
 - a. See [API Information and Installation Process](#) for assistance locating and opening the customer's API
 - b. For this example, the API URL is:
2. Click on Companies
3. Under Company Name, find the database name the website will access
 - a. In this example, Linder C2

Id	Company Name	Url Prefix	DbVersion
1	Linder C2	LinderC2	6.2.0.3
2	Linder C3 Sandbox	c3sandbox	6.2.0.3
3	Linder C5	sandbox5	6.2.0.3

10 items per page

4. In the Url Prefix column, copy the prefix
 - a. In this example LinderC2
5. Combine the URL and prefix for the SedonaWeb URL
 - a. In this example:
 - i. API URL =
 - ii. SedonaWeb URL = <https://linderapi.sedonaasp.com/LinderC2>
6. Logg out of the API
7. Launch the URL
 - a. Confirm you are logged out of the API
 - b. Launch the SedonaWeb URL
 - c. Internal login information:

- i. Username: automatedjob
- ii. Password: Perennial\$0ftware
- iii. DO NOT CHANGE OR SHARE THIS LOGIN INFORMATION WITH CUSTOMERS

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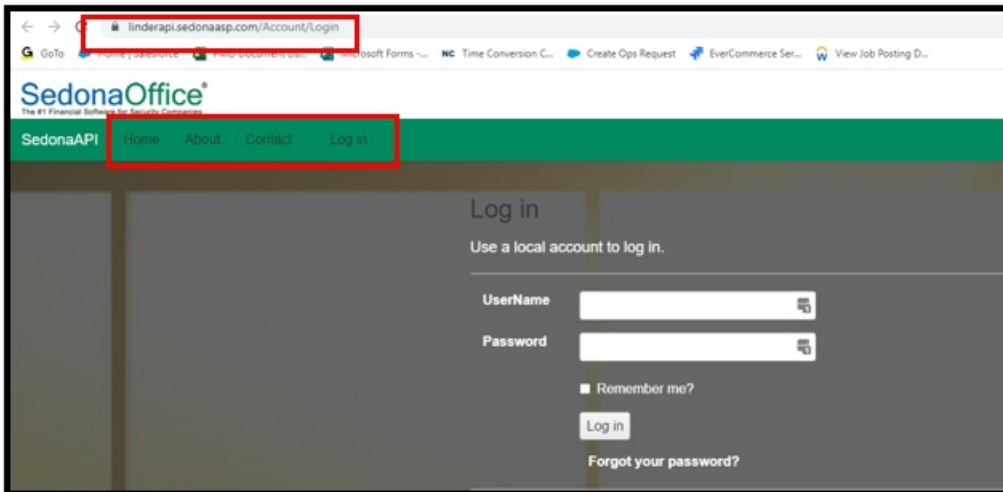
API vs SedonaWeb Sites

The API and SedonaWeb sites when launched will look very similar when launched unless the customer has made modifications to the sites. To tell the difference:

1. Does the URL have the database prefix?
 - a. No – API
 - b. Yes - SedonaWeb

2. Does the site menu have 'Register' as a menu option?
 - a. No – API
 - b. Yes - SedonaWeb

API - No database prefix in URL and no Register menu item



SedonaWeb – database prefix at end of URL and Register menu item is available

linderapi.sedonaasp.com/LinderC2/Account/Login

SedonaOffice®
The #1 Financial Software for Security Companies

SedonaAPI Home About Contact Register Log in

Log in

Use a local account to log in.

UserName

Password

Remember me?

[Register as a new Customer?](#) | [Forgot your password?](#)