

Sedona-X Mobile Add-On Module Implementation Process for SedonaOffice

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Purpose

This document walks a Project Manager (PM) through the steps necessary to implement the purchase of Sedona-X Mobile for use with SedonaOffice. Sedona-X Mobile allows users to access certain features of Bold Group applications via a mobile device vs logging into the application directly.

It is a replacement for the FSU product. It can be run in conjunction with FSU however customers will be billed for both applications if FSU users are not de-activated.

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Implementation Steps

The following steps are used to implement the application:

1. Project template: [Add On-Modules Implementation](#)
2. Review product compatibility chart for Sedona – X mobile
3. Verify customer's SedonaOffice version is compatible
 - a. Yes – move to step 2
 - b. No – see the document [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
4. Confirm the customer's API status
 - a. Included in the project quote?

i. Yes

i. Provide the customer with preinstall checklists for install in step 5 Kick Off email. The forms can be found under [Implementation and Installation Forms](#)

i. On-Prem: SedonaWeb (Limited API) On-Prem Preinstall Checklist

ii. Cloud: SedonaWeb (LimitedAPI) SedonaCloud Preinstall Checklist

ii. Include install time in step 5

ii. No

i. Confirm customer has API - see document [View Customer API Companies and Users](#)

i. No – inform sales API needs to be sold

ii. Yes – add time to step 5 if an upgrade required

5. Send Kick Off email

a. Template:

i. Customer not using FSU: 'SX App for SO'

ii. Customer using FSU: 'SX App for SO For FSU Customers'

b. Update compatible version information and the customer's known version information

Update fields in red

c. Link SedonaX user list.xls (attached to the article)

d. If API is:

i. being installed, remove "To log into SedonaCloud, your URL is"

ii. If installed provide the existing URL

6. 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
 - iii. Sedona-X install
 - i. 1 hour
 - ii. If more than 3 users, schedule an additional 5 min per user
 - b. Update the task Chatter to include all elements to be installed/upgraded
 - c. Upload any preinstall checklists and SedonaX user list
 - 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 if API is installed
7. Test the URL
- a. See Locating the Website URL section for more information in the document [View Customer API Companies and Users](#)
8. Provide API URL to the customer and user login information to the customer (if new install)
9. Confirm Training Prerequisites
- a. The customer has reviewed all Sedona-X Mobile videos linked in the kick-off email
 - b. The customer has setup one user and can see SedonaOffice data
10. Training
- a. Schedule training if sold

b. Estimated time: 1-hour minimum

i. Schedule for the time sold in the quote

11. Send Project Completion Request

12. Close Project

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