

SedonaAPI and SedonaWeb 2.0 - 1.40.2.1 - 1/11/2022

01/05/2024 11:54 am EST

Special Upgrade / Install Instructions:

If your company uses the SedonaCloud API, IT will update the SedonaCloud version at the same time as your SedonaOffice upgrade. This is to ensure compatibility with the all modules utilizing SedonaCloud.

Supported Environments:

Version Support

** This version of SedonaCloud requires SedonaOffice version 6.2.0.4 or above **

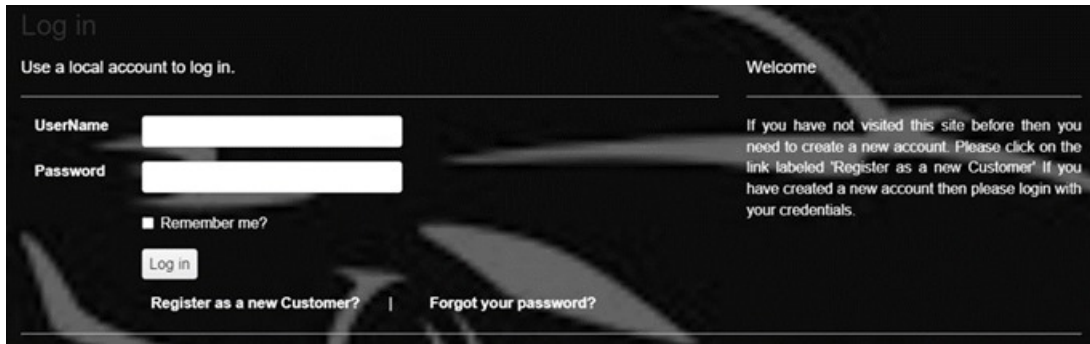
Minimum System Requirements:

- Server is on Microsoft .Net 4.6.1

Enhancements:

The attached SQL Script MUST be run against ALL SedonaOffice Company databases prior to upgrading.

Changes to Registering as a new customer:



The screenshot shows a login interface with a dark background. On the left, under the heading "Log in", there is a sub-heading "Use a local account to log in." Below this are two input fields for "UserName" and "Password". A "Remember me?" checkbox is present below the password field. A "Log in" button is located below the checkbox. At the bottom of the login form, there are two links: "Register as a new Customer?" and "Forgot your password?". On the right side of the screen, under the heading "Welcome", there is a paragraph of text: "If you have not visited this site before then you need to create a new account. Please click on the link labeled 'Register as a new Customer'. If you have created a new account then please login with your credentials."

Click "Register as a new Customer?" on the log in screen.

Register.

Create a new account.

Register

Authentication

*Copy the information from your invoice to the following fields.

Customer Number *

Invoice Number *

Customer Name *

Address 1 *

Billing Postal/Zip Code *

User Information

First Name *

Last Name *

Email *

Confirm Email *

Password * ?

Confirm password *

Phone

Extension

New Authentication Section added to Register screen:

The fields marked with an asterisk (*) are required.

The fields in the Authentication Section are validated to ensure you are adding a record for a customer that exists and is considered a valid owner of this customer/payment portal. This data must come from an invoice received from the portal owner. Each field is validated collectively to ensure they belong to the same customer.

The fields in the User Information section remain unchanged. Complete the required fields in the User Information section.

Click Register.

The web portal will open showing the customer's current balance on the invoice number entered during registration.

Changes to Link New Customer Account:

The same new Authentication section is added to the Link New Customer Account screen located under the Settings menu.

Link New Customer

Enter the information of the customer you want to link to this account

Create Link Back

Authentication

*Copy the information from your invoice to the following fields.

Customer Number *

Invoice Number *

Customer Name *

Address 1 *

Billing Postal/Zip Code *

User Information

First Name *

Last Name *

Phone

Extension

Mobile

Fax

Changes to Manage Customer Accounts:

Manage Customer Account is now Switch Customer Account located under the Settings menu.

The Switch Customer Account will load the same list as the initial login list. Users do not need to register/link to a sub-account of a master if the user has access to the master. The Sub Account menu will always allow access to all the master's sub-accounts.

Switch Customer Account

Customer Number	Customer Name	Selected	
MS7	Master Account Seven	Yes	<input type="button" value="View Customer"/>
414	S7-4	No	<input type="button" value="View Customer"/>

Removed Manage Customer Logins:

This was only available when viewing a master customer and did not provide enough information to enable you to select a user to modify so this functionality has been removed.

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