

SedonaOffice Hosted - Implementation Projects - User Setup

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[Purpose](#)

[Tools and Forms](#)

This document walks PM's through the available tools and forms necessary for proper customer user setup for the following project types:

- New SedonaOffice implementations in a Bold Group hosted environment
- SedonaOffice migrations to Bold Group hosted environment

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The following tools and forms are available to gather the appropriate data and to prepare customers for login to SedonaOffice in a hosted environment:

- Kick off call - documents to review with customer, to be returned PRIOR to server setup
 - [SedonaOffice New User Listing.xlsx](#)
 - [Sedona-X User Listing.xlsx](#) - If Sedona-X purchased
 - Kick off recap email templates:
 - [SedonaOffice Kickoff Recap - Hosted New Implementation](#)
 - [SedonaOffice Kickoff Recap - Hosted Migration](#)
 - If Sedona-X is purchased as part of the Hosted Migration, include SedonaX user List to
- Post Server setup - provide training material to customer and confirm training completed:
 - [Advanced Security eLearning](#) - Overview for customer's admin on using Advanced Security to manage their users whitelisting
 - [New Server Access Guide](#) knowledgebase article - provides information on logging into and managing/troubleshooting scenarios in a SedonaOffice hosted environment
 - [Sedona Portal Account Reset/Unlock eLearning](#) - walks customer through unlocking their SedonaOffice accounts
 - Email Template: [SedonaOffice Hosted Post Server Setup Training](#)

- Used for both New Implementation and Migration projects

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