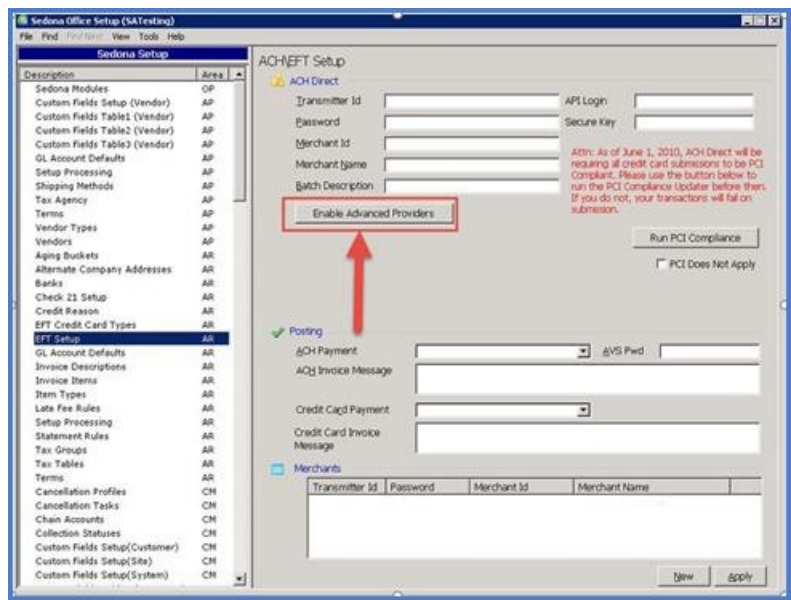


Payment Method Tokenizing Procedure for SedonaOffice

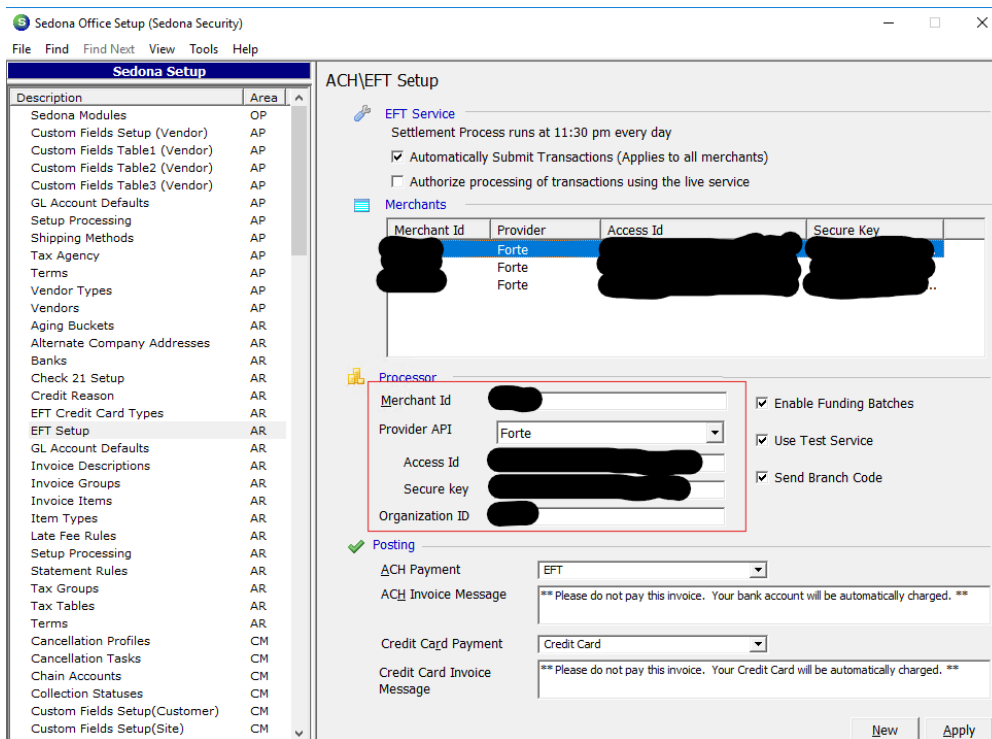
09/13/2024 6:01 pm EDT

First, the application files will be updated from version 5.7 to version 6+. This will be coordinated with the Support representative, IT, and the customer.

On the EFT Setup screen, enable Advanced Providers.



Once Advanced Providers is enabled, the API information will be filled out in the squared section of EFT Setup.



Open SSMS and complete the following:

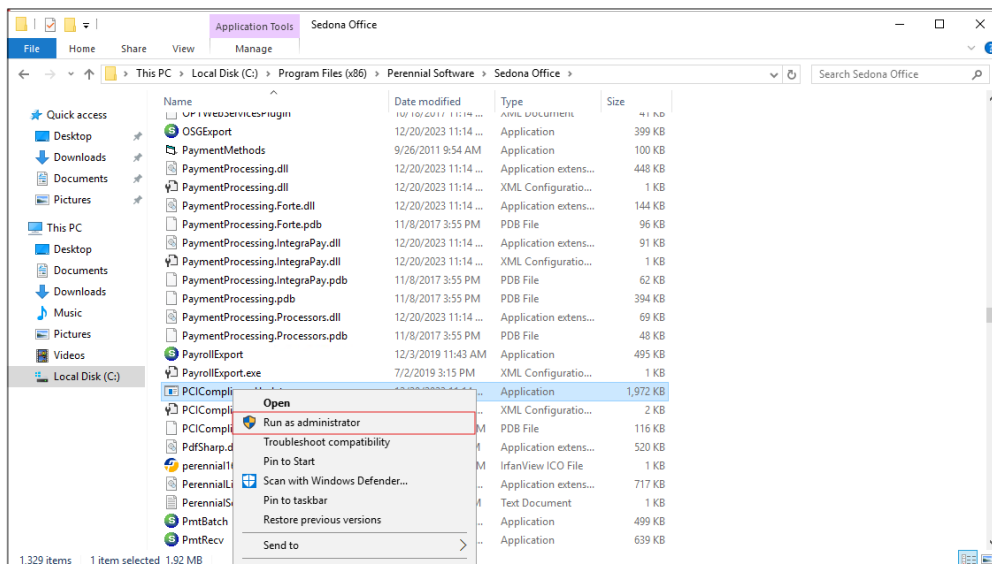
```
select * into ar_customer_cc_updatebackup from ar_customer_cc
```

```
select * into ar_customer_bank_updatebackup from ar_customer_bank
```

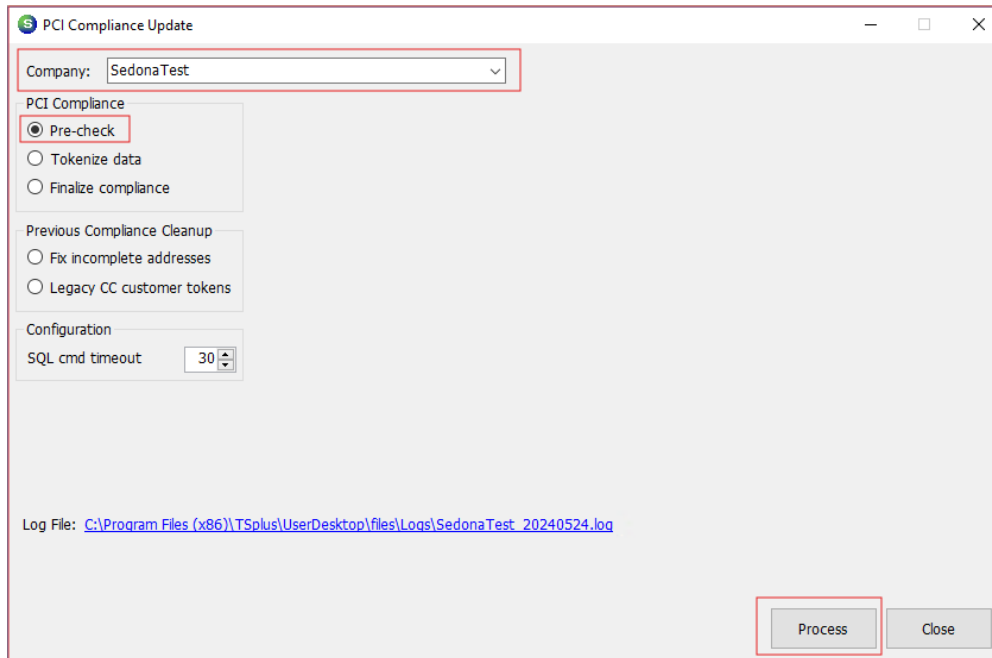
```
select * into ar_bank_updatebackup from ar_bank
```

These are in addition to the backup tables that the utility creates during the Pre-check.

Once the back up tables have been created, navigate to the file structure to run the PCI Compliance utility as Admin.

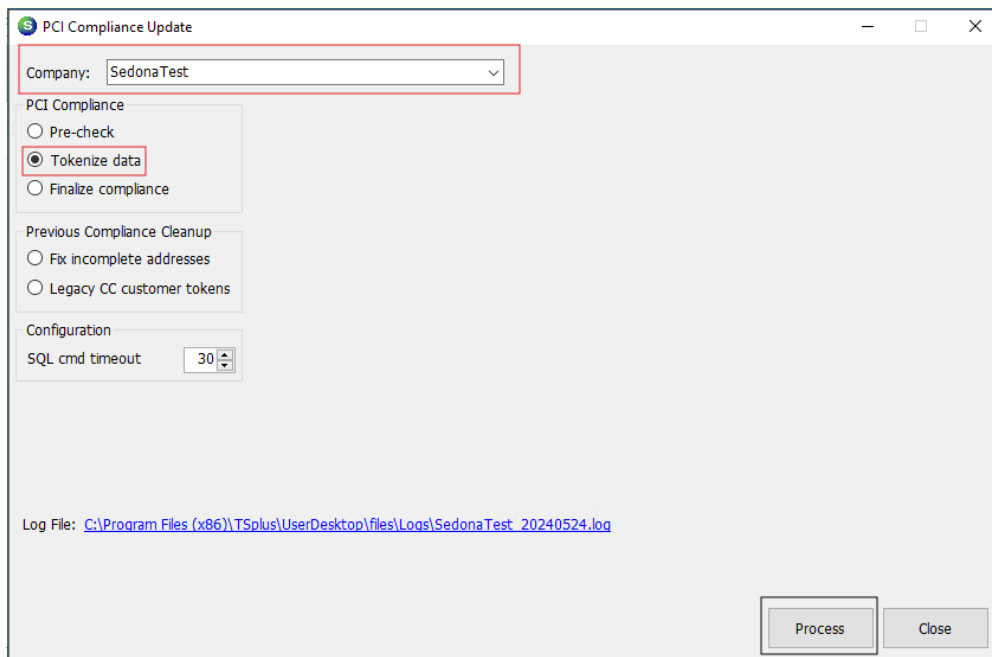


Run the Pre-check. This may reveal aberrant data that needs to be worked through. Such as, bad routing numbers, older transactions that were not submitted, or expired cards. The data is investigated prior to the tokenization process, however, if there's data that needs the customer's input to correct during the tokenization process, they will be contacted for resolution.



The screenshot shows the 'PCI Compliance Update' window. At the top, the 'Company' dropdown menu is set to 'SedonaTest'. Under the 'PCI Compliance' section, the 'Pre-check' radio button is selected. Below this, the 'Previous Compliance Cleanup' section has two unselected options: 'Fix incomplete addresses' and 'Legacy CC customer tokens'. In the 'Configuration' section, the 'SQL cmd timeout' is set to 30. At the bottom, the 'Log File' path is displayed as 'C:\Program Files (x86)\TSplus\UserDesktop\files\Logs\SedonaTest_20240524.log'. The 'Process' and 'Close' buttons are located at the bottom right.

Tokenize the records.



This screenshot shows the same 'PCI Compliance Update' window, but with the 'Tokenize data' radio button selected under the 'PCI Compliance' section. All other elements, including the 'Company' dropdown, 'Previous Compliance Cleanup' options, 'Configuration' settings, 'Log File' path, and 'Process/Close' buttons, remain the same as in the previous screenshot.

Mark as compliant.

PCI Compliance Update

Company: SedonaTest

PCI Compliance

☐ Pre-check

☐ Tokenize data

☒ Finalize compliance

Previous Compliance Cleanup

☐ Fix incomplete addresses

☐ Legacy CC customer tokens

Configuration

SQL cmd timeout

30

Log File: [C:\Program Files \(x86\)\TSplus\UserDesktop\files\Logs\SedonaTest_20240524.log](C:\Program Files (x86)\TSplus\UserDesktop\files\Logs\SedonaTest_20240524.log)

Process

Close