

ADI Integration - Reference Guide

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NOTICE: The ADI Integration has not received any Development update for a few years. As of 7/7/25 ADI will be changing their server configurations in a way that will prevent the integration from functioning. However, a Partner Blackleaf Solutions will takeover as a middleman to allow the integration to work. There will be additional information on this sent in a marketing blast. Troubleshooting should remain the same unless you have several customers report the same issue with connectivity/exact error message close together.

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About this Document

This Reference Guide is for use by SedonaOffice customers only. Its purpose is designed to help users understand the setup and functionality related to the ADI Integration available within SedonaOffice.

Note: The ADI Integration is an add-on module for SedonaOffice. For assistance in purchasing this module, please contact your Bold Account Manager.

Note: To be able to attach an ADI PDF invoice to a SedonaOffice Bill, your company must subscribe to the add-on module, SedonaDocs. For assistance in purchasing this module, please contact your Bold Account Manager.

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What the Integration Does & Does Not Do

The SedonaOffice interface with ADI, who is a major supplier of parts for the security industry, enables purchase orders to be submitted with real-time price checking, the ability to download acknowledgements, receive shipment tracking information, pickup locations, the ability to view invoices, and other data.

The primary goal of the integration is to:

- Place orders directly from SedonaOffice to ADI
- Reconcile SedonaOffice Receipts to ADI Invoices

To achieve that goal, here is a summary of what the integration does and does not do.

What It Does

The integration allows ADI Customers to do the following within SedonaOffice:

- Create ADI purchase orders with valid minimum order quantities and current lot costing on ADI products, including sale data and national inventory.
- Specify ADI approved shipment methods and pickup locations.
- Submit orders to ADI electronically.
- Download order acknowledgements and shipping numbers to the associated purchase orders in SedonaOffice.
- Create SedonaOffice AP Bills directly from each ADI invoice.
- Download PDFs of each invoice into SedonaOffice AP Bill

What It Does Not Do

The integration does not provide any of the following functionality:

- Sync the ADI product list to the parts table stored in SedonaOffice. Use the Parts Importer instead.
- Sync costs for ADI parts with current costs from ADI. ADI's web services provide lot costs rather than unit cost.
- Adjust part pricing used in future quotes. ADI's web services provide today's prices for the quantity ordered.
- Show inventory by ADI warehouse.

Configuration Requirements

Activation

- Update to SedonaOffice build 6.2.0.22 or higher
- Contact ADI for contract and credential information michael.brady@adiglobal.com
- Email IntegrationADI@sedonaoffice.com after you have received your ADI Credentials. SedonaOffice will send you contract, configuration questions and schedule the first of two half-hour training sessions.

Configuration Questions

1. Do you use a different ADI Customer Suffix for different branches in SedonaOffice?
2. What is the name of your ADI vendor in SedonaOffice? Do you only have one ADI vendor we need to configure for the integration?
3. Can you provide the GL Accounts you will use for
 - Freight
 - Insurance
 - Taxes

SedonaOffice auto-assigns charges to these accounts when creating bills from ADI Integration.

4. Do you have an existing Shipment Method that represents a pickup location?
5. Do you store ADI Product Numbers as inventory part codes or vendor part codes?

Setup

User Group Permission

To give users permission to access the ADI Integration, the User Group permission “ADI Integration” must be selected in the AP Module.

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Once the user permission has been activated, the user will see the ‘ADI’ button at the bottom of the Purchase Order application.

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ADI Integration Dialog

Users granted the “ADI Integration” permission in the AP group can access the integration’s main window via the ADI button on the bottom of the Purchase Orders List window.

Users can find the application settings in the File menu.

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Settings

Activation Key: [Redacted]

Customer Number: 020 [Redacted]

Default Suffix: 000 By Branch ...

FTP Server: ftp.adiglobal.com

FTP User: SC0 [Redacted]

FTP Password: [Masked]

Invoice Data: [Dropdown]

Local Path: C:\Users\ [Redacted] \AppData\Roaming\Perennial Software\ADI_ [Redacted] \Integration

Web Service URL: http://sedona.adiglobal.com/SedWebService.asmx

Web User: SC0 [Redacted]

Web Password: [Masked]

Freight Account: 5 [Redacted] Freight on Parts

Insurance Account: 6 [Redacted] Insurance Expense

Tax Account: 5 [Redacted] Taxes on Parts Purchased

ADI Part Code: ☒ Inventory ☐ Vendor

Save Close

The following fields will be provided for you by ADI and SedonaOffice:

- **Activation Key:** key is created by SedonaOffice
- **Customer Number:** ADI Customer Number
- **FTP Server:** ADI Server address
- **FTP User:** User Names supplied by ADI
- **FTP Password:** supplied by ADI
- **Local Path:** link to user's local directory where text files are stored, this location is setup during configuration

he only settings you are likely to change after the initial setup include the following:

- **By Branch:** If your ADI Customer Number has multiple suffixes for different locations, you can map additional suffixes to branches in SedonaOffice
- **GL Accounts:** Freight Account, Insurance Account, and Tax Account to which the integration assigns expenses that appear on ADI invoices. Each account drop-down shows accounts from the Expense, Cost of Goods Sold, and Other Expense categories.

ADI Part Code: allows the user to specify whether SedonaOffice stores the ADI Part Code as the Inventory Part Code or Vendor Part Code.

- **Inventory:** if selected, the ADI Integration will use the SedonaOffice Part Code to search for parts numbers when the user is selecting parts to create purchase orders for the ADI vendor. If the ADI Part does not exist in the SedonaOffice Database the user needs to create the SedonaOffice part before creating the purchase order.
- **Vendor:** If selected, the ADI Integration will use the ADI Product List to search for parts and creating purchase orders for ADI vendor. If the part code does not exist in the SedonaOffice Part table, the integration will auto create the part in SedonaOffice database after the purchase order is saved.▯

When a part is auto created in the SedonaOffice Part table the application will not populate all fields under the Part Detail tab it will however populate the Vendor tab. It is the user's responsibility to update all part information.

View of Part when Auto Populated:

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Part Detail Tab

Vendor Tab

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ADI Integration Tabs

The ADI Integration dialog spreads its functionality across separate tabs for Purchase Orders, Invoices, and general purpose Tools.

Purchase Order

The Purchase Orders tab allows users to submit, review, and acknowledge purchase orders for ADI vendor.

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Purchase Orders list

The Purchase Orders list shows ADI orders for branches containing warehouses for which you are a material handler. You may filter the list by order date, branch and status. The user may select to show purchase orders that have a ready status only or closed purchase orders. By default, the list shows orders in the *Ready* status.

Show Purchase Orders by Status checkboxes

Use the Ready, Sent, and Acknowledged checkboxes to filter the Purchase Orders shown at the left. *Ready* purchase orders are those that are queued to submit to ADI. *Sent* purchase orders are those that have been sent but not yet acknowledged. *Acknowledged* orders are orders ADI has received and checked on the back-order status of individual line items, a process usually finished within 20 minutes. The Status column of the Purchase Orders list shows the status of each order.

Send Selected Orders button

Press Send Selected Orders to submit checked and *Ready* purchase orders to ADI. The integration will not send those already *Sent* or *Acknowledged* unless the user selects to resubmit from the notification window.

Acknowledge & Track button

Press Acknowledge & Track to download all available acknowledgement and shipping info ADI publishes on new orders. Acknowledgement data include the backorder status of individual line items. The integration marks purchase orders and line items as backordered in SedonaOffice.

The integration appends shipment tracking numbers to order memos and shows the most recent tracking number in each purchase order's Tracking # field.

Change Status of Selected Orders ... button

Press Change Status of Selected Orders ... to mark selected orders as *Sent*. Use this feature to prevent sending purchase orders submitted online or via other means.

Invoices Tab

The Invoices tab allows users to download invoice data, create bills, and download invoice PDFs to the SedonaOffice AP Bill using SedonaDocs.

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Data Files list

The Data Files list shows invoice data files ADI publishes. ADI begins processing orders as soon as they are received but does not create an order's invoice until the products are shipped or picked up. ADI publishes each day's invoice data at the end of the day, which is why each data file ends with a time stamp. The file named "C02517_20150209.txt" was published the morning of February 09, 2015, and contains data for the previous day's invoices.

Invoices list

The Invoices list shows all invoices in the selected data file. Use the checkbox to select invoices from which you intend to create bills. Purchase orders that produce partial shipment show one line per invoice.

Parts list

The Parts list shows parts on the selected invoice in the ADI data file.

Download Invoice Data button

Click the Download Invoice Data button to download all available invoice data files from ADI's servers.

Create Bills for Selected Invoices button

Press Create Bills for Selected Invoices to create bills for checked items in the Invoices list. If the order produced just one shipment, this is all you need to do. If the order produced partial shipments, you will be asked to verify which receipt you are billing, as shown below. Note that the Reference column contains the ADI invoice number, a best practice that helps you identify the receipt for this invoice.

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Remove Selected Invoice Data ... button

Press Remove Selected Invoice Data ... to remove selected items from the Invoices list for which you do not intend to create bills, such as when you create bills manually or straight from the receipt.

Download Invoice Docs button

Press Download Invoice Docs after creating bills to download and attach a PDF copy of the invoice to each bill in SedonaOffice, using SedonaDocs to store the files. If you do not have SedonaDocs, visit <http://www.sedonaoffice.com/products/sedonadocs/> for more information.

*You can download invoice PDFs for bills you created by hand as long as they have the ADI invoice number.

Refresh button

Press Refresh to update the Data Files list with the server's most recent list of data files.

Tools Tab

The Tools tab provides general purpose tools, typically used to initialize the integration.

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Update Product List button

Press Update Product List to download the ADI product list containing minimum order quantities but not cost. This list is stored separate from your SedonaOffice parts list. ADI updates the product list files each weekend. Most product lists contain around 146,000 products.

Update Shipping Data button

Press Update Shipping Data to update ADI approved shipping methods and pickup locations. Each customer suffix has its own set of pickup locations, where the first item in the list is the default location.

Check Prices button

Press Check Prices to perform a quick price check for one unit of items in your price list. Check multiple prices by entering multiple part codes separated by commas.

*Get Part Kit Items
and Prices button*

Press Get Part Kit Items to perform a quick price check for a kitted part the system will list the kit items and your price list.

Purchase Order Process

1. Create Purchase Order

Create ADI purchase orders much like you would before. A Purchase Order may be created in various locations throughout the SedonaOffice application:

- From the Purchase Order option within the Accounts Payable Module
- Within a Job
- Within a Service Ticket
- From a Warehouse Explorer record
- From a Parts Explorer record
- From a Vendor Explorer record

When ADI is the selected vendor, there are just two new requirements:

1. Select an ADI approved shipping method or pickup location. Without this information, your order cannot be fulfilled.
2. Press the Price Check button to check prices. The Purchase Order form will check prices on new purchase orders if the user forgets to price check before saving the purchase order.

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When your system is configured to use the Vendor part code as the ADI part code in the integration's Settings dialog. Visit the ADI web site (<http://adiglobal.us>) to look up the correct part code and change the vendor part code to match the ADI # on the ADI web site. This should never occur when your system is configured to use the Inventory part code as the ADI part code because you search from the ADI product list rather than your SedonaOffice parts table.

Save the purchase order as you normally would by clicking OK. This order is now ready to submit to ADI.

2. Submit Order to ADI

Within the ADI Integration dialog, the order created in the previous step now appears in the Purchase Orders list with the *Ready* status. Select all invoices you intend to submit as described in the ADI Integration Dialog section and press Send Selected Orders.

Approximately 20 minutes later, ADI confirms purchase order [acknowledgements](#)

. If you do not receive an acknowledgement check back later in the day or the next day. Press Acknowledge & Track any time to download acknowledgement and tracking data for any available orders.

3. Receive Shipment

Receive orders in the main application as done before with the following considerations:

- Enter the ADI order number as the Reference field to assist when reconciling receipts to invoices.
- If you intend to create the bill from the ADI invoice data, do not check the Create Bill from Receipt checkbox before saving the receipt.
- If an order results in partial shipments, ADI invoices those shipments separately. Create a receipt for each shipment and receive “O” units of items not in the current, partial shipment, as shown below.□

4. [Create Bill from ADI Invoice Data](#)

On the Invoices tab of the ADI Integration dialog, select the data file and invoice(s) to process, and then press Create Bills from Selected Invoices to begin processing. The Activity Log lets you know if a receipt has been received on the related purchase order for a matching dollar amount.

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You may need to map partial shipments to invoices where one order produces multiple shipments. If you match the Reference column to the invoice number and the parts on the receipt, you should be able to identify the correct receipt. If the part line items do not match, check with ADI to understand the differences. If you do understand the differences, which may be due to special prices or kits, press Save to create the bill from the selected receipt.

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Click the Download Invoice Docs button to download PDFs from ADI, associate them with bills by invoice number, and store them in SedonaDocs.

5. [ADI Invoice](#)

The bill should now appear amongst the vendor bills in the main application, along with the appropriate expenses and a copy of the invoice as a PDF stored in SedonaDocs.

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Purchase Order Process for Kits

1. Create Purchase Order

A kit can be purchased on the same purchase order as regular parts. To clearly demonstrate the steps, we only list a kit on this purchase order.

1. Your first steps are the same to create a purchase order as listed in the previous section. You will notice a new column called "Is Kit" this indicates if a part code is a Kit or not.□
2. Perform a Get Kit Items before saving the new order. The Get Kit Item button populates the individual parts under the Kit Parts tab. The user will need to select the Get Kit Items button whenever they are ordering kit parts. Then Press the new Price Check button to check prices. The Purchase Order form will check prices on new orders if you forget.

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Once "Get Kit Items" button is selected the application will load the individual parts under the Kit Parts tab.

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It is important to note, if your company selected the Inventory option to search parts based on Sedona part code all kit parts must be listed in the SedonaOffice Part Table in order for the part appear under the Kit Parts tab.

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2. Submit Order to ADI

Within the ADI Integration dialog, the order created in the previous step now appears in the Purchase Orders list with the *Ready* status. Select all invoices you intend to submit as described in the ADI Integration Dialog section and press Send Selected Orders.

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3. Receive Shipment□

4. Create Bill from ADI Invoice Data□

5. ADI Invoice

All kit parts are listed under the Parts Tab

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Taxes, miscellaneous cost, are listed under the Expense Tab, the kit part will show with a zero value because the individual parts are listed on the Parts tab.

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Summary of Inventory Tracking for kitted part:

Purchase Order:

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Receipt:

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Journal Entry:

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