

SedonaOffice Upgrade Process

12/03/2025 10:39 am EST

SedonaOffice Upgrades Process

Prior to the upgrade plan for the following:

- You and your team are familiar and have reviewed the release notes and any pre-requisites for the current release

<https://sedonaoffice.knowledgeowl.com/help/> > Select Release Notes

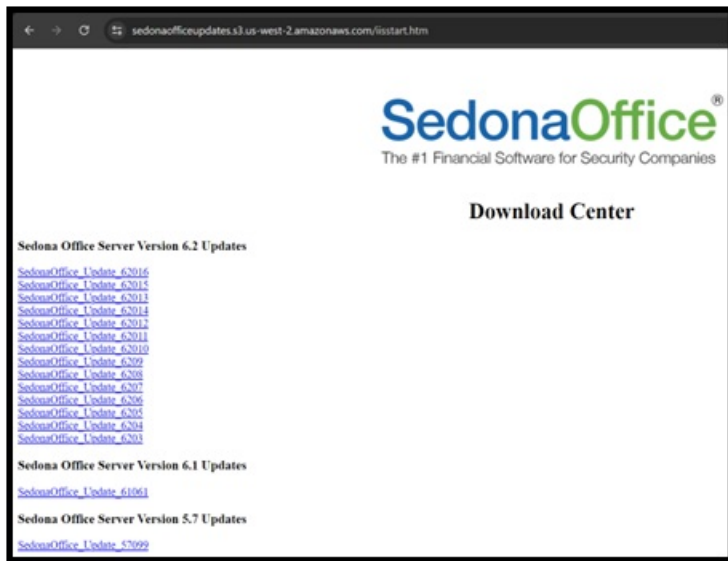
- You have received the Day Code from BoldGroup Support for the day you plan on upgrading
- The user profile running the update has both local admin and sysadmin on the Sedona SQL server
- The updater executable is cleared from any Antivirus/AntiMalware security scans
- All users have exited the application, any shared app services such as Vivid, OPT, QuoteWerks, & WeSuite and stopped all web and integration communication
- Ensured there are no Data Drive space, log, or SQL DB status, or resource issues present on your Sedona SQL Server
- You have taken snapshots/backups of your SedonaSQL server and databases according to your company's Data Recovery and Record Keeping standards. Also that your maintenance and SQL Server Agent jobs are complete or not scheduled during your upgrade. There is no viable rollback option to reinstall only the previous version of the SedonaOffice Client software as the upgrade make changes to databases, .Net & DLL library connections, as well as local file changes. Rollbacks or restores will result in data loss to the time of your last backup.

Note: If you're upgrading through multiple major releases, the order is as follows: 5.7.0.99 > 6.1.0.61 > Current Release. We recommend coordinating any upgrade from 5x to 6x as a project with our team and any 3rd part support products you are using e.g. OPT, Astute/Vivid, WeSuite by creating a case on our support portal <https://support.boldgroup.com/> or emailing sedonaoffice_support@boldgroup.com.

1. Download the current release from our File Depository or Via the SedonaOffice Server Client Tools.

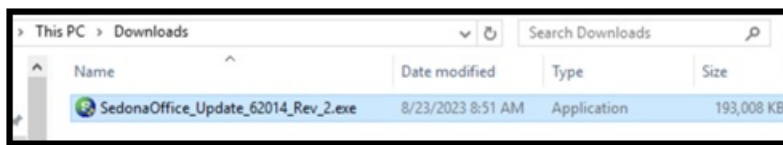
Note: The Server tools download requires the Sedona SQL server to have internet access

<https://sedonaofficeupdates.s3.us-west-2.amazonaws.com/iisstart.htm>

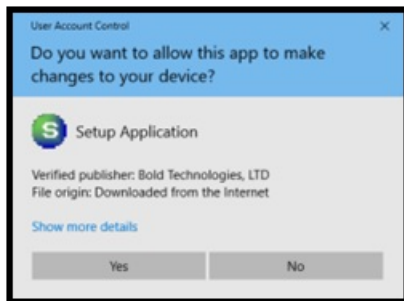


You can run the upgrade executable from downloads or move it into your preferred UNC path for all of your networked machines, but should still run it initially from the Sedona SQL Server

Reminder: The user running the upgrade executable must have both Local Admin and SysAdmin in SQL of the Sedona Server to successfully update



2. You will likely receive an elevated UAC prompt. Press Yes

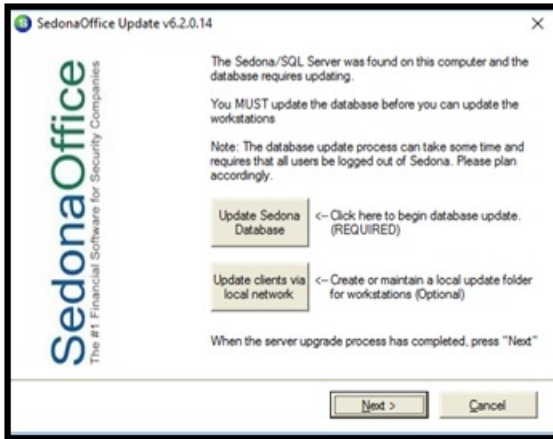


3. The updater will initialize. If you receive any errors from this point forward you will want to recheck that no other users are in the application, no windows updates are pending, no security program is flagging the updater executable, and nothing is otherwise locking the Sedona Application files/folders/ or services.



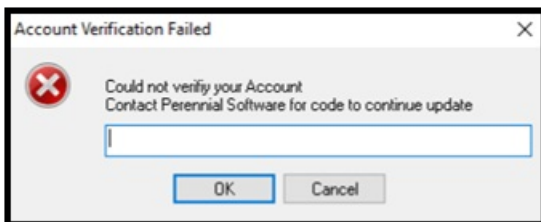
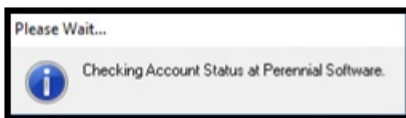
4. Select Update Sedona Database – This updates the SedonaDatabases with the necessary script changes

Note: This will only update Companies & sandboxes that are listed in the SedonaMaster Company table

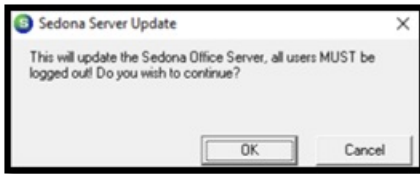


DO NOT SELECT UPDATE CLIENTS VIA LOCAL NETWORK

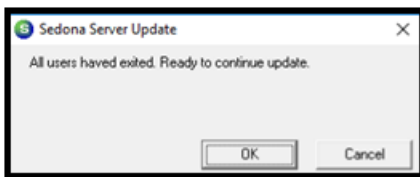
5. You will receive a Status Check and likely receive a Verification Failed prompt – Enter the DayCode Here



6. The next prompt will ensure that there are no users currently in the SedonaOffice Client App



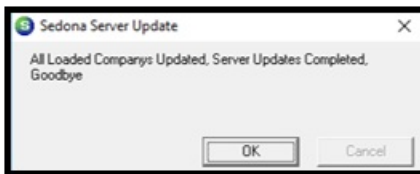
7. If you have forced log off or no one is in the SedonaOffice Client you will receive the next prompt Press OK



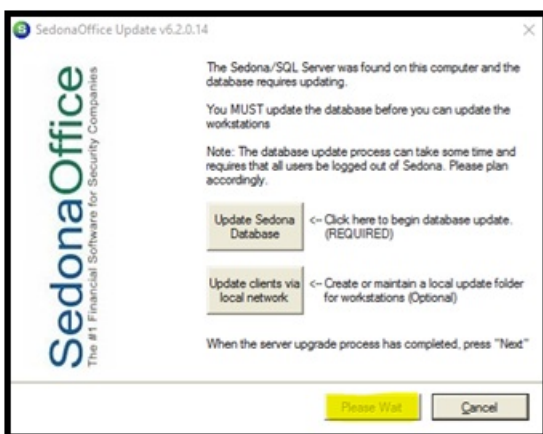
8. The updater will run all scripts needed between your installed version and the release you are upgrading to

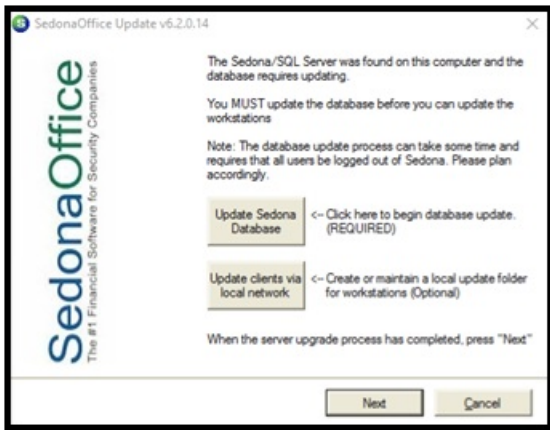
Reminder: If you are updating from a previous major release, we recommend creating a support case

9. You will receive a Server Updates Completed message Press OK



There are registry changes that will be made to ensure that the Server is updated to reflect the current version. Mind the wait button on this screen

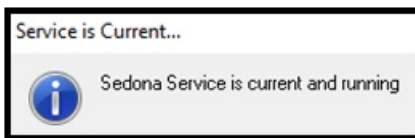




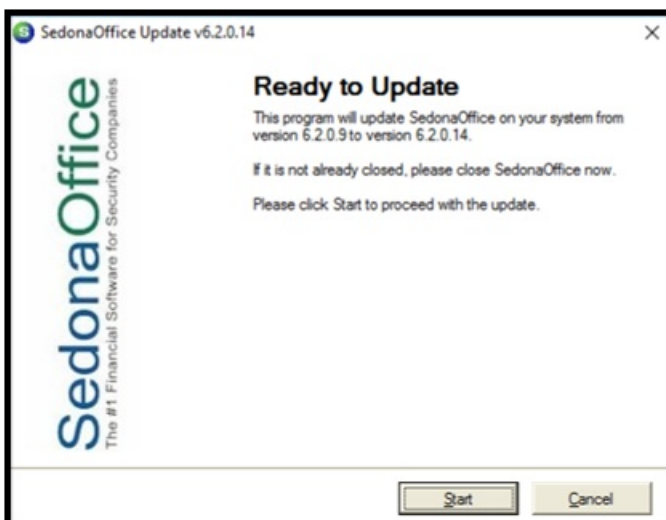
10. When the wait has finished, you can select Next to proceed to the SedonaOffice Client Update

Note: We do not recommend updating clients via network unless your IT/MSP has properly configured this in advance

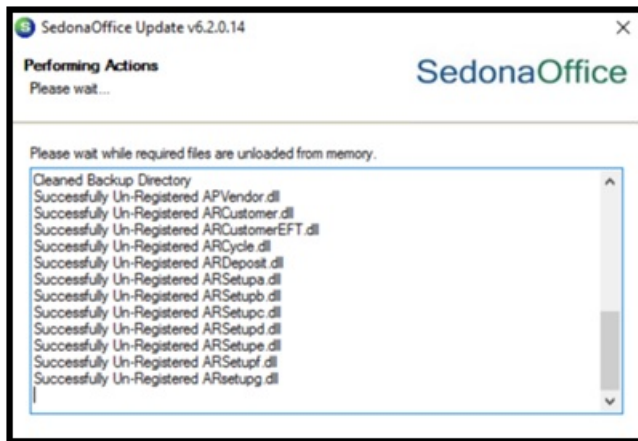
The updater will check the current SedonaService and SedonaEFT Service versions and stop them for updates



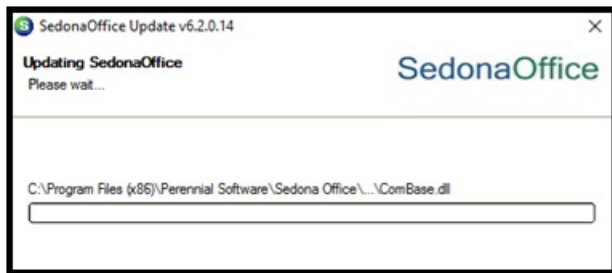
11. Press Start to begin the SedonaOffice Client update process



You will notice that many of the SedonaOffice files will be un-registered and re-registered, including DLL files

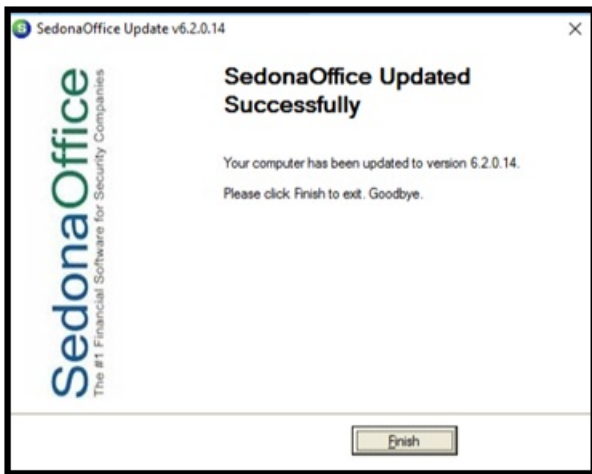


Then it will start installing the current file stack and register those to the machine



If you receive any errors at this point, they will likely be due to either a shared dll library file in use or corrupted dll file from users accessing the application or other services still attempting to connect. In these instances the Updater will prompt you to Retry or Continue. Any files that cannot be updated, it will advise that they will be attempted to be installed on Reboot. A reboot will normally not be necessary but if required you should plan to run the Client portion of the installer again to ensure there are no errors during this section.

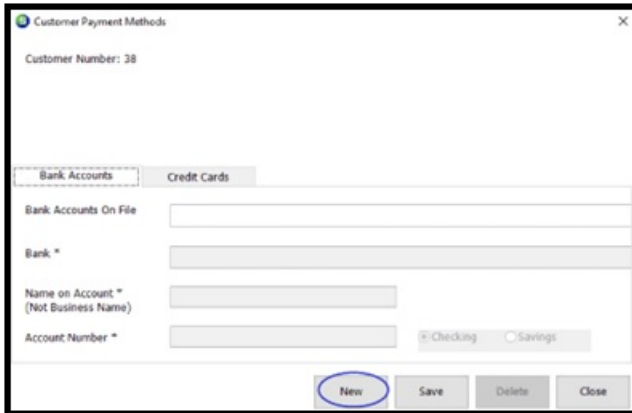
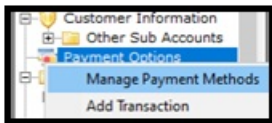
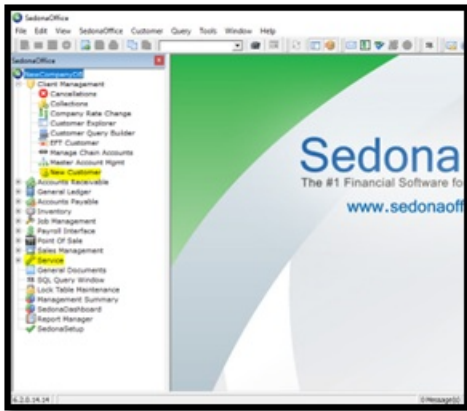
12. Press Finish to complete the upgrade



Optional: We recommend having a Sedona Power User or Subject Matter Expert validate the following base operations post upgrade on the Sedona SQL Server before proceeding to update any workstations/terminals

1. Proper Version Verification on the Login Prompt in the lower left corner
2. Successful Login to the application
3. New Customer Module
4. Service Module [if used]
5. Tickets/Jobs/Documents
6. Additional Payment Method



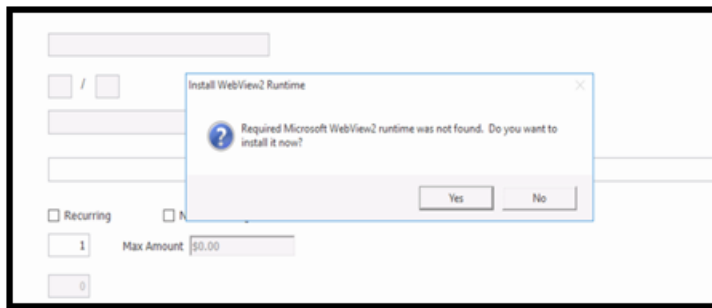


Note: For the 6.2.0.14 release there was a code change specific for Forte Modal window access. This change requires all machines that need to add/modify payments to have Microsoft WebView2 installed. This is typically included in Microsoft Edge Browser installations that are kept up to date.

If Microsoft WebView2 is properly installed, you will see the following window

If it is not installed, the user will be prompted to install WebView2 as in the image below.

Note: The user must have the proper privileges to install WebView2 to proceed



If your team encounters any critical issues/errors post upgrade, we recommend capturing the following two log files and running the update again.

C:\Program Files (x86)\Perennial Software\Sedona Office\SedonaOffice Update Log

C:\Program Files (x86)\Perennial Software\Sedona Office\SedonaOfficeSedonaUpdate

You can then reach out to our support for any next steps by our support portal <https://support.boldgroup.com/> or by emailing sedonaoffice_support@boldgroup.com.

Please Note: Test/UAT Server Support and Server Migrations are not covered in support and must be a coordinated project. Reach out to your Account Manager for more details or enter a support case for proper routing.