

SedonaOffice - SedonaSync – Implementation

Overview & Expectations

Summary

SedonaSync, paired with SedonaOffice Enterprise Webcaster, enables automated alerts, system-driven actions, and scheduled reports based on real-time activity within SedonaOffice. While a library of pre-canned events is available to accelerate deployment, each implementation still requires configuration to match your business environment. Bold's team provides a structured implementation process to ensure success.

What's Included

- **SedonaOffice Enterprise Webcaster**

This module includes three powerful components:

- **Alerts** – Email/SMS notifications based on system triggers (e.g., overdue invoices, expiring contracts).
- **Actions** – Automated updates to records (e.g., changing statuses, updating fields).
- **Reports** – SSRS-based reporting that can be scheduled or event-triggered (e.g., service summaries, aging reports).

- **Pre-Canned Event Library**

A library of standardized, ready-to-use event templates is available.

➤ These still require configuration to reflect your specific setup, including data structures, branches, and business rules. See event list and time requirements here

- **1 SedonaOffice Database Connection**

The base license includes one database connection.

➤ Additional licenses are required for multiple databases or third-party application connections.

- **1 Admin License**

One administrator license is included. This is typically sufficient, as events operate automatically once configured.

Implementation Requirements

- **Not Plug-and-Play**

Even with prebuilt templates, each customer's workflows and data model require tailored configuration and testing.

- **Pre-built Event Library**

Review attached pre-built event library and requirements

- **Technical Configuration Required**

- SQL scripting
- SedonaOffice schema familiarity
- SSRS knowledge for report-driven automation

- **Multi-Branch Deployments**

Events may need to be configured differently for each branch, increasing scope and complexity.

- **Time & Materials Billing**

All implementation services (configuration, testing, and training) are scoped via a signed **Statement of Work (SOW)** and billed accordingly.

Optional Functionality

- **SMS Notifications via Twilio**

To enable SMS messaging, customers must create a [Twilio account](#) and activate “**Programmable SMS.**”

Platform Note

SedonaSync is a white-labeled solution powered by Vineyardsoft KnowledgeSync. You may see references to the underlying platform during setup or documentation.

Resources

- **On-Prem Installation Requirements**

[View Minimum Hardware/Software Specs »](#)

- **Training Materials:** Provided during onboarding or upon request
- **Pre-Canned Events List (see attached excel file)**