Comdata Setup

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Before being able to use the Comdata Interface, there are items that must be completed in SedonaSetup.

User Group Security

Within the SedonaSetup application, under Users, select an employee that will use the Comdata integration.

The red arrow above identifies the User Group or Groups that this employee is a member of. Use this process for each of your employees and determine which User Group or Groups will need access to Comdata Integration. Once you have that listing, you will need to enable Comdata Integration for each of these User Groups.

Enabling User Group Access to Comdata Integration

Now that you have the listing of User Groups, you can enable Comdata Integration for each of these User Groups.

Select the User Group section of SedonaSetup.

Repeat this process for each User Group you wish to enable.

Running the Comdata Integration for the First Time

Sign in to the SedonaOffice application using a User that has had one or more of their User Groups enabled for Comdata Interface.

Important: If the user was already signed into SedonaOffice when you changed the permissions, that user will need to log out and then back in to load the changes you made.

Expand the Accounts Payable section of the main tree. You should see an option for Comdata Interface. Double click on this option.

The Comdata Integration main screen should load.

If this loads successfully, all files are correctly installed and you are ready to input the company credentials that Comdata provided.

Entering the Comdata Company Credentials

Click the Comdata option from the toolbar and select “Settings”.

Enter the Account Code, Customer ID, Username, Password, Username (VCWS) and Password (VCWS) exactly as provided by Comdata. Be sure to **key** in the information - **do not copy and paste** - doing so risks added spaces or control characters which prevent the application from communicating with Comdata. Select the bank account that Comdata will use to post payments.

Important: It is recommended that you setup a special bank account specifically for Comdata usage. For more assistance establishing a bank account in SedonaOffice, please review the online help or contact SedonaOffice support.

Once you have all of the options filled out, click Save. Click OK at the prompt and then click Close.

Configuring Vendors for Comdata Use

Minimize the Comdata Integration Window. In the SedonaOffice application click Vendors. Search on and select one of the vendors that you will submit payments to through the Comdata integration.

Right click “Vendor Information” and select “Edit Vendor”.

Click on the tab for “Comdata”. Check the box indicating that this is a Comdata vendor. Enter the Comdata vendor code from the approved vendor listing. Click Save.

Once you complete these steps, the vendor is configured for use with Comdata Integration. All invoices available to pay (net due > $0) are eligible for electronic payment!

Repeat this process for each vendor on the approved vendor listing. Once you have completed that step, you are ready to use the Comdata Integration.