FAQs - Required Upgrade for Forte Compatibility: SedonaOffice 5.7 to 6.2.0.16

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Frequently Asked Questions

This article is for SedonaOffice 5.7 users who process payments in SedonaOffice using the CSG Forte payments integration. CSG Forte is making a change to their infrastructure that affects the integration with legacy versions of SedonaOffice.

> ⚠️ **Action is required.** To continue using the CSG Forte integration to process payments, your organization must upgrade to SedonaOffice version 6.2.0.16 by April 30, 2024. **To begin your upgrade, please open a support case in Bold Group's support portal.**

We understand the significant time and planning that goes into making a software update. Our support team will work closely with you to schedule and guide your upgrade. To minimize any impact upon your system and business operations, we ask that you do not attempt to upgrade your system without the involvement of Bold Group's support team.

If you do not manage your organization's software upgrades, please share this information with the correct members of your team.

1. What change is CSG Forte making?

CSG Forte announced they are retiring three legacy applications, including SOAP API, as part of an upgrade to their technology infrastructure. This change means that CSG Forte will no longer support SOAP-based integrations after April 30, 2024. SOAP, or Simple Object Access Protocol, is a method of exchanging data through web service APIs. CSG Forte shared the following information in a statement to customers:

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2. Why does this change affect my legacy SedonaOffice software?

The SedonaOffice 5.7 integration with CSG Forte is configured using SOAP. Once Forte retires SOAP and completely transitions to REST API, SedonaOffice 5.7 will no longer be compatible with the Forte platform, and SedonaOffice 5.7 users will not be able to process payments using Forte.

(Note: SedonaOffice versions 6.0 and above use more modern API solutions and will not be affected.)

3. What action is required to keep using the Forte integration in SedonaOffice?

To continue using the Forte integration to process payments in SedonaOffice, you must upgrade your legacy version of

SedonaOffice to version 6.2.0.16 by April 30, 2024, This is the minimum required version to process payments from the SedonaOffice client.

As a reminder, Bold Group strongly recommends customers always update to the latest version of SedonaOffice to ensure the stability and security of your software and access the latest features, enhancements, and bug fixes.

4. Who is required to make this update?

You are required to make this upgrade if:

(1) You use the Forte payment platform for payment processing; AND

(2) You are operating SedonaOffice version 5.7 or earlier.

5. Who does not need to make this upgrade?

You are not affected by this issue and do not need to make this upgrade if:

(1) You do not use the Forte payment platform for payment processing; or,

(2) You are operating SedonaOffice version 6.2 or above.

6. How do I know what version of SedonaOffice I am using?

You can find the version number on your SedonaOffice login screen in the lower lefthand corner. You can also find this information after you have logged in by selecting **Help** then selecting **About SedonaOffice**. The version number will be at the top of the screen that opens.

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7. How do I make this update?

Please open a support case in the Bold Group Support Portal immediately. A Bold Group support technician will then reach out to you and schedule a meeting with you to complete the upgrade during Bold Group support hours (8:00 am – 6:00 pm ET).

Important Note: Due to the complex nature of this upgrade, it must be completed in partnership with a Bold Group support technician. Please do not attempt to upgrade your system without our support team. Without proper checks, the upgrade process could cause reconciliation issues with your accounts/payments and have a negative impact upon your system and business operations.

8. When do I need to complete the upgrade?

You need to complete the upgrade to SedonaOffice version 6.2.0.16 by **April 30, 2024**.

9. What happens if I don't update my software by April 30, 2024?

If you have not updated your software to SedonaOffice version 6.2.0.16 by April 30, 2024 then you will not be able to

use CSG Forte to process payments in SedonaOffice.

10. Will this update introduce other changes to my system?

Yes. Updating your system to version 6.2.0.16 will introduce a new EFT processing program along with other enhancements and bug fixes.

To learn more about the setup and functionality of EFT processing in your upgraded system, please visit our resource center in the SedonaOffice knowledge base.

11. What resources are available to learn more?

We have several resources available to help you learn more about SedonaOffice 6.2.0.16 and understand the impact this update will have on your system. Please visit our resource center in the SedonaOffice knowledge base to find the following resources:

Making the Upgrade

- Frequently Asked Questions
- Upgrade Checklist
- Critical Highlights for Upgrading from SedonaOffice 5x to 6x

Understanding EFT Setup and Processing

- EFT Processing Reference Guide
- EFT Setup Changes
- Setups Required for version 6.0+

Watch Instructional Videos

- EFT Processing 1 of 2 and Part II: EFT Processing 2 of 2
- SedonaOffice 6.2 EFT Update
- EFT Module for 6.0 Webinar

SedonaOffice 6.2 Release Notes

12. How can I prepare for the upgrade?

In the resource center, you will find an upgrade checklist and additional information to help you prepare for this required upgrade. Please share this information with the team that manages your organization's software updates.

13. Will this upgrade affect integrations with third-party applications?

You should identify third-party integrations you have deployed in your SedonaOffice software and notify those providers that you are making this update. Those providers can supply information about what impact, if any, this

upgrade will have upon your integration.

- **WeSuite**: If you use WeSuite, please notify them at wesupport@wesuite.com
- **OPT:** If you use OPT Events via SedonaSync, you must notify OPT at support@optbusinessservices.com
- **Astute**: If you use Astute Reports (Vivid Flex/Vivid CPM) please contact support@astutefinancial.biz

14. Will there be any downtime during the upgrade process?

Yes, there will be downtime associated with the upgrade. The length of downtime depends upon a number of factors, including the complexity of your data, resources of your server(s), and network speeds. The support technician managing your upgrade can provide an estimate that is specific to your organization.

15. I use SedonaWeb. Will this upgrade affect that?

SedonaWeb 1.0 users will have to upgrade to SedonaWeb 1.0. version 2.7.81 as part of your SedonaOffice upgrade.

SedonaWeb 2.0 users will need to be on the Sedona API version that corresponds to the SedonaOffice Client version you are upgrading to.

16. What if I don't want to make this update?

To ensure compatibility with the Forte Payments platform after April 30, 2024, this update is required. We know your ability to make payments is central to your business, and we evaluated this update as necessary to maintain your core business functions.

17. If I have a problem with this update, can I roll it back?

No, this critical update cannot be rolled back.

18. What if I have additional questions or need more help?

If you have questions we didn't answer in our Frequently Asked Questions or resource center, please get in touch at sedonaoffice_support@boldgroup.com.

If you do not feel like you are receiving the support you need with this or any other SedonaOffice support issue, please reach out to Bold Group's Director of Customer Support for Business Management products, Fiona Beckstrom, at fiona.beckstrom@boldgroup.com.