

Critical Highlights for Upgrading from SedonaOffice 5x to 6x

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- If you currently utilize **WeSuite** and are planning to upgrade to 6.2x you must notify WeSuite wesupport@wesuite.com to ensure continued functionality of their integrations
- If you currently utilize **OPT Events** via SedonaSync you must notify OPT Support@optbusinessservices.com to ensure continued functionality of OPT generated events
 - If you currently utilize both WeSuite and OPT Events via SedonaSync please coordinate with both parties for any independent upgrades to ensure their respective continued functionality (this is specific to Crystal Reports)
- Customers **upgrading to resolve the SedonaWeb legacy 1.0 credit card payment issue** will be moved to the latest version of SedonaWeb which has more security features including invoice, name, address, and exact match requirements.
 - This applies to both the latest version of SedonaWeb Legacy and SedonaWeb 2.0
- Customers utilizing **QuoteWerks** must be advised that the latest QuoteWerks build v5.7 b2.40 is not compatible with Sedona Office. Subsequently all builds of QuoteWerks that no longer use pit files are impacted (those between April 2021 -current)
- If **upgrading to SedonaWeb 2.0** existing SedonaWeb customers will require a password reset and checkbox acknowledgement to activate their account on the new platform
- There is not a method to roll-back the Sedona Office database upgrades Enterprise customers must have their IT or SQL Admin take an isolated backup of all production databases to be preserved in case of any issues post upgrade.
- **PDF Explode** is no longer supported.
- **Check21** can no longer be used in your upgraded version as it is not PCI compliant.
- **If your SedonaOffice system is integrated with Manitou**, please identify what version of Manitou you are using and let your Bold Group support technician know so we can prepare the appropriate scripts.

A few additional tips to keep in mind for EFT processing setup:

- When reviewing the EFT Processing Guide, please ensure you have read through it carefully and understand how the system handles refunds and previously funded transactions.
- Make sure you have completed the setup so that your system can process previously funded transactions without error
- If you have entered payment information in SedonaOffice, but do not use CSG Forte to process payments, you will lose this payment information as part of the update. Without the Forte tokenization process to secure sensitive data, this payment information will not be PCI compliant.

- Settlement Process: this now happens automatically and does not need to be run manually from the payment processing screen. In version 6.2, when you click the settle button, this causes the entire settlement process to run instead of settling the specific record selected, which causes a significant slowdown of your system.
- We recommend that "Enable Funding Batches" be turned on as your default. Without this option enabled, you will have to manually move transactions between batches and spend extra time ensuring deposits in SedonaOffice match deposits in Forte.

DO NOT attempt the upgrade of the Sedona Client App without our support as it could cause reconciliation issues with your accounts/payments and delay productivity for your team. Our specialist will coordinate with you to schedule each step of the process.