



SedonaWeb/SedonaAPI 2.0 Release Notes

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SedonaWeb 2.0

Enhancements/Features

Added Level 2 Credit Card Processing

SedonaWeb now supports level 2 credit card processing. These changes include adding the Procurement Code to credit card information and sending the invoice number, tax amount, and procurement code to the Forte transaction.

We added a field for the **Procurement Card** code and checkboxes for the Procurement Card Authorized Use: **Invoice** and **Advance Deposit**. Users will see this when adding or editing a credit card. The procurement card code can be 17 characters (letters and numbers).

The screenshot shows the 'Edit Credit Card' form with the following fields and values:

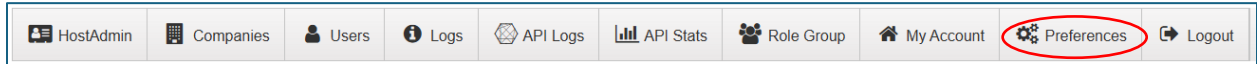
Card Type	MAST
Last Four Digits	4444
Name on Card	Testing
Expiration Date	10 / 30
Billing Street Address	1234 Bug Ln
Postal Code	28625
Procurement Code	fdfd
Procurement Card Allowed Use	<input checked="" type="checkbox"/> Invoice <input checked="" type="checkbox"/> Advance Deposit
	<input type="checkbox"/> Use card for auto bill payment ⓘ

When users enter payments, they will see if the selected card is a procurement card. They will also see when they selected a procurement card if it is allowed to be used for invoice payments or advanced deposit payments. If the procurement card is not allowed to be used, they cannot save or submit the payment.

Any messages for procurement cards use the words “allow” or “allowed” instead of “authorized” to avoid confusion with status messages related to Forte.

SedonaWeb 2.0 Portal UI Configurability [00037582, 99436, 103272, 119146]

For Company Administrators configuring the SedonaWeb 2.0 Portal, we have added more options for configuring both the content and styles used on the pages. This includes options for the parent entity (Company Preferences), as well as those for affiliated dealers (Branches) using the portal. To see these new options, log into SedonaWeb 2.0 and click the **Preferences** button:



On the login page, the text SedonaAPI and link appeared beside the Home link. We removed SedonaAPI and link. Now the login page shows Home, About, Contact, Register, and Log in.

At the Company and Branch levels, there are several new preferences:

- About Page and About Page Content: these are for hiding the About page (true shows the page and false hides the page) and customizing content displayed on the About page:

Name	Description	Value
About Page	About page	true
About Page Content		This is the About page

- Contact Page and Contact Page Content: these are for hiding the Contact page (true means the page is visible and false means the page is hidden) and customizing content displayed on the Contact page:

Contact Page	Contact page	true
Contact Page Content	Custom content for the Contact page	Call us at

- Header Bar Color and Header Bar Text Color: these are for changing the color for the header bar and header bar text:

Header Bar Color	HEX color code for the header bar	#71138f
Header Bar Text Color	HEX color code for the header bar text	#e1071e

- Footer Bar Color and Footer Bar Text Color: these are for changing the color for the footer bar and footer bar text:

Name	Description	Value
Footer Bar Color	HEX color code for the footer bar	#5052df
Footer Bar Text Color	HEX color code for the footer bar text	#fbf9f9

- Login Page Background Image, Login Page Error Text Color, Login Page Message, and Login Page Text Color: these are for changing the background image for the login page and the login page text and text color:

Login Page Background Image	Background image for the login page	
Login Page Error Text Color	HEX color code for the login page error text	#FF0000
Login Page Message	Text displayed on the Login screen. HTML markup is allowed.	This is the logon message
Login Page Text Color	HEX color code for the for the login page	#3e23ec

At the Branch level, there are new preferences for showing or hiding these pages on the Customer portal (a value of true shows the page; a value of false hides the page):

- RMR
- Invoices
- Pay Invoices
- Payments
- Payment History
- Payment Methods
- Site Listing
- Service
- View Service Ticket Details
- Create Service Tickets
- Documents
- Upload Documents

Branch		Your Branch	For the Value column, leaving it empty will default to the Company Value.		
Name	Description	Value	Category		
Customer Portal - Create Service Tickets	Customer Portal - create a new service ticket	true			<input checked="" type="checkbox"/>
Customer Portal - Invoices	Customer Portal - access invoices	true			<input checked="" type="checkbox"/>
Customer Portal - Pay Invoices	Customer Portal - pay invoices	true			<input checked="" type="checkbox"/>
Customer Portal - Payment History	Customer Portal - access payment history	true			<input checked="" type="checkbox"/>
Customer Portal - Payment Methods	Customer Portal - access payment methods	true			<input checked="" type="checkbox"/>
Customer Portal - RMR	Customer Portal - access RMR	true			<input checked="" type="checkbox"/>
Customer Portal - Site Listing	Customer Portal - access site listing	true			<input checked="" type="checkbox"/>
Customer Portal - Upload Documents	Customer Portal - upload documents	true			<input checked="" type="checkbox"/>
Customer Portal - View Service Ticket Details	Customer Portal - view service ticket details	true			<input checked="" type="checkbox"/>
Footer Bar Color	HEX color code for the footer bar	#f1a13			<input checked="" type="checkbox"/>
Footer Bar Text Color	HEX color code for the footer bar text	#fa98b			<input checked="" type="checkbox"/>
Footer Line 1	Appears in the web footer				<input checked="" type="checkbox"/>
Footer Line 2	Appears in the web footer				<input checked="" type="checkbox"/>
Footer Line 3	Appears in the web footer				<input checked="" type="checkbox"/>
Header Bar Color	HEX color code for the header bar	#f3de1e			<input checked="" type="checkbox"/>
Header Bar Text Color	HEX color code for the header bar text	#e5103e			<input checked="" type="checkbox"/>
Header Logo Image	Image at the top of every page				<input checked="" type="checkbox"/>

The preferences set at the Company level for hiding or showing these pages are the defaults for all branches. The preferences set at the Branch level override the defaults.

Clone Role Groups

We improved the process of creating role groups. We added the ability to copy existing role groups as presets for new role group creation. To find this feature, follow these steps:

1. Log into SedonaWeb 2.0.
2. Click Role Group.
3. In a row for a role group, click the clone role group button. This opens the Clone Role Group Manager page.

Id	Group Name	Group Description	
1	Salesperson	Salesperson	✓ B
2	Salesperson	Salesperson	✓ B
6	Jr. Tech	Jr. Tech	✓ B
7	Subcontractor	Subcontractor	✓ B
8	Sr. Tech	Sr. Tech	✓ B
9	Project Manager	Project Manager	✓ B
10	Manager	Manager	✓ B
11	SubProjectManager	SubProjectManager	✓ B

4. Type a **Group Name** and **Group Description**. Any user with rights to the Role Groups page can clone a role group.

Clone Role Group Manager

Group Name:

Group Description:

Permissions:

- API
- APP
- AG1
- ARBILL
- ASPNMENT
- BRANCH
- CATEGORY
- CHECK
- COLLECTIONSTATUS
- CONTRACTFORM
- CREDIT
- CREDITDETAIL
- CREDITREASON
- CRITICALMESSAGE
- CUSTOMERAGING
- CUSTOMERBANK
- CUSTOMERBILL
- GETALL
- CUSTOMERBILL
- POST_CUSTOMERBILL
- UPDATE_CUSTOMERBILL

Submit Cancel

5. Click the **Submit** button.

Moved Sedona-X Mobile Permissions First on Role Group Permissions

On the Detail Role Group page, the permissions for SEDONAXMOBILE were at the bottom of the list. We moved this group of permissions to the top (above the API permissions).

Edit Role Group

Group Name: Salesperson2

Group Description: Salesperson

Permissions: Search Permissions

- SEDONAXMOBILE
 - APPTRESCHEDULE
 - ALLOWMANUALLABOR
 - ALLOWSYSTEMUPDATE
 - VIEWSUBCHARGES
 - VIEWFINALCHARGES
 - REMOVECONTACTS
 - ACCESSCCBANK
 - CLOSEDTICKETS
 - TIMEATTENDANCE
 - CHANGEORDERS
 - ADDPAYMETHOD
- API
 - SEDONAONEMOBILEAPP

Added Permissions for Hiding Fields on Customer (Portal) Invoice View [00119143]

We added permissions for administrators configuring accounts for portal customers. These additional permissions are for hiding or showing three fields for portal customers: Category, A/R Account, and Tax Group.

With this SedonaWeb 2.0 update, the three fields (Category, A/R Account, and Tax Group) will be hidden by default to portal customers.

To show or hide these fields:

1. Log in as an administrator user.
2. Click Preferences.

3. In the Preference list, find the Customer Portal preferences.

Name	Description	Value	Category	
Customer Keypad Code	Customer Keypad Code	1234		
Customer Master Account Code	Customer Master AccountCode	N/A		
Customer Master Item Code	Customer Master Item Code	MON		
Customer Panel Phone	Customer Panel Phone	3035551212		
Customer Portal - Create Service Tickets	Customer Portal - create a new service ticket	true		
Customer Portal - Documents	Customer Portal - access documents	true		
Customer Portal - Invoice- Show A/R Account	Customer Portal - Invoice- show A/R account	true		
Customer Portal - Invoice- Show Category	Customer Portal - Invoice- show category	false		
Customer Portal - Invoice- Show Tax Group	Customer Portal - Invoice- show tax group	false		
Customer Portal - Invoices	Customer Portal - access invoices	true		

4. Click the edit button (at the end of the row) for one of these options: (this opens the Edit Preferences page)
 - a. Customer Portal - Invoice-Show A/R Account
 - b. Customer Portal - Invoice-Show Category
 - c. Customer Portal - Invoice-Show Tax Group
5. On the Edit Preferences page, in the box beside the field name, type the word **true** to show the field. Type the word **false** to hide the field.

Customer Portal - Invoice- Show Tax Group
Customer Portal - Invoice- show tax group

Customer Portal - Invoice- Show Tax Group

Application Corrections

Cannot view Sub Account in SedonaCloud [00061917, 00076634, 78178, 106680]

We fixed an issue when users logged into the SedonaCloud portal as a customer set up as a master account, they could not see the sub accounts.

Sedona JQuery Vulnerability

To address this, we updated jqueryvalidation to v1.19.5 and updated the HTML files to pull the 1.19.5 version.

SedonaWeb 2.0 Master Accounts Cannot Open Sub Accounts [00104997]

In a situation where a master account has many sub accounts, users could not see the sub accounts through the customer portal; the accounts screen would not load the sub accounts. We resolved this issue so that the accounts screen can show many sub accounts.

SedonaAPI 2.0

Enhancements/Features

Added Invoice Group to Update (PUT) Customer API Endpoint

We added the Invoice group Id and number to the Customer API endpoint. For the Customer API endpoint, this change allows adding and editing an invoice group when adding and editing a customer.

In SedonaOffice, add the Invoice group Id and number to the Customer.

In SedonaAPI, initialize the service and add the relationship.

Field Names:

- InvoiceGroupNumber
- Invoice ID

Note: Delete does not use the two new fields.

Customer	
GET	/api/Customer
PUT	/api/Customer Update Customer
POST	/api/Customer Add Customer (Obsolete - use POST /api/Customer2)
GET	/api/Customer/{id} Returns a specific Customer record by Customerid.
PUT	/api/Customer/{id} Update Customer (Obsolete - use PUT /api/Customer)
DELETE	/api/Customer/{id} Deletes specified Customerid. Only allowed if the customer has one bill-to, one site, and no other associated information.
PATCH	/api/Customer/{id} Update Customer (Obsolete - use PUT /api/Customer)
GET	/api/Customer/{id}/{option} Returns a set of Customer records based on the option parameter. The id parameter may or may not be used. Values for the option parameter are: 'ByCustomerNumber' - a single record for Customer where {id} = CustomerNumber, 'ByCancelledRecurring' - list of customers cancelled via recurrings over a period of time (date range passed into {id} in format YYYYMMDD-YYYYMMDD), 'ByEmployeeId' - list of customers accessible to the employee dictated by the employee's user's customer group restrictions, where {id} = EmployeeId (employee must be active and associated with a SedonaOffice user that has access to at least one customer group)

Special Upgrade/Installation Instructions

If your company uses SedonaWeb 2.0/SedonaAPI 2.0, IT will update the version at the same time as your SedonaOffice upgrade. This is to ensure compatibility with all modules using SedonaWeb 2.0/SedonaAPI 2.0.

.NET Framework 4.8 automatically uses TLS 1.2. TLS 1.2 must be the only TLS version Enabled in the Registry. TLS 1.0 and TLS 1.1 must be disabled. Verify that they are disabled, and that TLS 1.2 is enabled.

Supported Environments

- This version of SedonaWeb 2.0/SedonaAPI 2.0 requires SedonaOffice version 6.2.0.19 or above.
- Server (where SedonaWeb 2.0 is installed) has Microsoft .NET 4.8 installed.