



# SedonaWeb/SedonaAPI 2.0 Release Notes

August 2025

Version 1.51.0

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## SedonaWeb 2.0

### Enhancements/Features

**Note:** The enhancements and features in SedonaWeb 2.0 v1.51.0 require SedonaOffice v6.2.0.20. For SedonaOffice enhancements, refer to the [SedonaOffice v6.2.0.20 release notes](#).

### Bill Contact for New Accounts Set to True for all Active Existing SedonaWeb 2.0 Companies

To ensure that web users will have access to bills when they log in to view their accounts, the setting for Bill Contact for New Accounts will be set to “true” by default. This will be set by default only for this release. In the future, Administrators can decide if they want this set to true or false.

# Company/Branch Preferences

Branch

Company Preferen... ▾

Drag a column header and drop it here to group by that column

Name	Description	Value	Category	
About Page	About page	true		<a href="#">✎</a>
About Page Content		To view the text use edit button		<a href="#">✎</a>
Ach Transaction's Customer Number	Ach Transaction's Customer Number	000000		<a href="#">✎</a>
Allow Unresolved Service Tickets	Allow Unresolved Service Tickets	1		<a href="#">✎</a>
AP Account Code	AP Account Code	210100		<a href="#">✎</a>
Append Resolution Notes	Append Resolution Notes	1		<a href="#">✎</a>
AR Account Code	AR Account Code	110110		<a href="#">✎</a>
Avoid Resolution Notes	Avoid Resolution Notes	0		<a href="#">✎</a>
Base URL	Location of SedonaWeb application	abc		<a href="#">✎</a>
Bill Contact for New Accounts	Sets up the new account as a bill contact	true		<a href="#">✎</a>

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### SedonaWeb 2.0 User Management Updates

We established a better connection between SedonaWeb 2.0 users and SedonaOffice contacts. SedonaWeb 2.0 follows permissions set in SedonaOffice for control of these:

- SedonaWeb 2.0 logins can be added through SedonaWeb 2.0 or through SedonaOffice.

- SedonaWeb 2.0 logins appear as contacts on their associated customers regardless of how the logins were entered.
- SedonaOffice users can control if a SedonaWeb 2.0 login (customer contact) is active or inactive.
- SedonaOffice users can control which sites the SedonaWeb 2.0 login is allowed to access service tickets for.
- SedonaOffice users can control which sites the SedonaWeb 2.0 login is allowed to access billing invoices for.
- If SedonaOffice users delete a customer contact, the SedonaWeb 2.0 login is also deleted.
- A SedonaWeb 2.0 login can apply to multiple SedonaOffice contacts across different customers.

### **SedonaWeb 2.0 Customer User Management in SedonaOffice**

SedonaWeb 2.0 gets the latest information (such as username, password, status, or if the web user was deleted) from the SedonaWeb database when a user logs in or registers. SedonaWeb 2.0 will not show inactive customers associated with the web user.

The SedonaOffice contact settings contribute to what a customer user sees after logging in to SedonaWeb 2.0.

For customers:

- Shows information for the Bill To associated with the contact such as invoices, RMR, and payments.
- Shows information for the site associated with the contact, such as sites, tickets, and documents.

For master customers:

- On the Open Invoice and Pay Invoice form, the Bill To column (which was previously called the Sub Account column) shows the Bill To information for the master customer
- The master site is not shown.

For customer and master accounts:

- Any updates to name, last name, and phone number are updated in SedonaOffice.
- On the invoice and payment page, we updated the width of the grid.
- For the payment method, the web users will see the payment methods for Bill To addresses they have access to and any that are not associated with a specific Bill To address
- On the home page, the Current Balance and Auto Bill Pay are hidden if the web user does not have permission for all Bill To Addresses.

Host user:

- When editing a customer user from the host (Host > Users > Customer Users), SedonaWeb 2.0 checks the SedonaOffice database to see if the user was deleted. If the customer user was deleted, SedonaWeb 2.0 shows a message and restarts the page without the deleted user. If the customer user was edited, the updated information is loaded.
- When deleting a web user in SedonaWeb 2.0, the web user is deleted in SedonaOffice.

Company user:

- When logged in a company and attempting to edit a customer user (Company > User > Customer Users), SedonaWeb 2.0 checks the SedonaOffice database to see if the user was deleted. If the customer user was deleted, SedonaWeb 2.0 shows a message and restarts the page without the deleted user.

## **SedonaWeb 2.0 Linking New Customer Accounts in SedonaOffice Contact Entry**

When a customer user links a new customer account through the customer portal, that customer user is added to the site contacts for the account that has been linked.

## **Configurable Payment Options SedonaWeb**

We changed the Payment Method Inactive setting to use the Web Enabled setting in SedonaOffice instead of the payment method setting in SedonaWeb 2.0. For more information about this change, read the release notes for [SedonaOffice v6.2.0.20](#).

SedonaWeb 2.0 follows the web enabled setting in SedonaOffice. If the web enabled setting is set to Y, then the credit card payment is allowed in SedonaWeb 2.0. If the web enabled setting is set to N, then the credit card payment is not allowed in SedonaWeb 2.0 and the credit card type cannot be added. This distinction can prevent a credit card type from being used in SedonaWeb 2.0 while still allowing it in SedonaOffice. Note that any credit card type set to inactive in SedonaOffice cannot be web enabled for SedonaWeb 2.0. Inactive credit card types will not appear in SedonaWeb and cannot be added.

## **Customizable Emails from SedonaWeb 2.0 [38198, 124162]**

Administrators of SedonaWeb/API 2.0 can customize email templates for new account registrations and password resets. We added two company preferences to update the email body:

1. Email Confirm Registration Body (EmailConfirmRegistration)
2. Email Forgot Password Body (EmailForgotPassword)

To see these, log into SedonaWeb 2.0. Click Preferences. Find these preferences in the list. Click the Edit button for one of the preferences. The edit Preference Email Confirm Registration Body page or the edit Email Forgot Password Body is displayed. Make changes to the text to customize the email by adding for example: @lastname, @email, change font, underline text etc. Save the changes. Emails sent to confirm user registration or emails sent for forgotten passwords will reflect the customization.

By default, the actual text (html page) is shown when updating preferences. Once saved, the preferences display the saved text.

These are available to use when customizing emails:

- @logo
- @userName
- @link
- @userFirstName
- @userLastName
- @userEmail

## **Application Corrections**

### **Deleting a login account from SedonaWeb that is linked to a customer, does not delete records in the Sedona Office tables [29945]**

When a user was deleted, their associated email address could not be reused. This issue arose because not all related tables and data were deleted, leaving remnants that prevented the email address from being fully removed from the system.

We are ensuring that all related tables and data are deleted when a user is removed. This will allow the email address to be completely cleared from the system, making it available for reuse.

### **All contact records not updated correctly when changed in SedonaWeb [27349]**

When the SedonaWeb account information is updated, all linked records are now updated correctly.

### **Adding multiple companies to SedonaWeb Login Contact Note not populated [27308]**

The Note field was not being populated correctly when a SedonaWeb account was linked to more than one customer. We fixed this so each contact record created for a customer has the Created via SedonaWeb note.

### **Systems not based on site selected [46954]**

The System dropdown was not being filtered by Site. Also, there was no system type next to the name/ID in the system dropdown.

We fixed both issues: the System dropdown now shows just the systems related to the selected Site and we added the type in the label, so users can select the correct system.

### **When a user changes a role group while anyone is assigned to that role group, they receive an error message [00051244, 121398]**

Changing a custom role group that had users assigned to that role group generated an error. We corrected the error so users can change role groups.

### **Need to be able to re-use previously used emails in SedonaWeb 2.0 [69276]**

When a user was deleted, their associated email address could not be reused. This issue arose because not all related tables and data were deleted, leaving remnants that prevented the email address from being fully removed from the system.

We are ensuring that all related tables and data are deleted when a user is removed. This will allow the email address to be completely cleared from the system, making it available for reuse.

### **Customer Portal Registration Error/Issue [00071526]**

When customers attempted to register as a new customer on the customer portal, they got an error message. (The user did get created, but there was no indication.) They did not receive the welcome email with the confirmation registration verbiage and link in it.

We resolved this so users can register without error and receive the welcome email.

### **Export to Excel in SedonaWeb Question [00074355, 131287]**

We fixed an issue with the export to Excel button. The export button is working on Master Customers, Sub Accounts, and Customers

### **Online bill pay vs Invoice is the incorrect amount [00075862,77875,114787, 119608, 121572]**

There was a discrepancy of one cent between the balance shown in SedonaOffice and the SedonaWeb payment portal when customers tried to pay online.

We fixed this issue, so the amount shown on the SedonaWeb payment portal matches the balance in SedonaOffice.



### **Sedona Web 2.0 - How to change Login User Name [82645]**

When a user was deleted, their associated email address could not be reused. This issue arose because not all related tables and data were deleted, leaving remnants that prevented the email address from being fully removed from the system.

We are ensuring that all related tables and data are deleted when a user is removed. This will allow the email address to be completely cleared from the system, making it available for reuse.

### **The registration emails that SedonaWeb sends do not have consistent font [00096416, 00138710]**

The registration emails that SedonaWeb sends do not have consistent fonts.

This issue was fixed in Customizable Emails from SedonaWeb 2.0 [38198, 124162].

## **SedonaAPI 2.0**

### **Application Corrections**

#### **Sedona API: /api/CustomerInvoice does not have EFT Pending flag in the model [86133]**

The AR\_Invoice table has the flag for Has\_EFT\_Pending; however, this was not in the API model. Users needed access to this flag to know which invoices are already in the process of being paid.

We added the Has\_EFT\_Pending to the model to show in the GET Customer Invoices:

- Get/ api/ CustomerInvoice
- Get/ api/ CustomerInvoice/{id}
- Get/ api/ CustomerInvoice/{recordId}/option
- Get/api/CustomerInvoice/{customerId}/{option}/{categoryId}/{option2}

#### **API: Sedona PUT for Job Notes populates Job\_Id with NULL. [00124708, 123861]**

When using the PUT /api/Job/{jobID}/Notes/{id} endpoint, the request updated the Notes but populated the Job\_Id with NULL.

To correct this issue, we fixed the Put option and updated Add.

#### **Update to email address on bill to does not update/create ar\_customer\_bill\_email Email Address Fields Using Customer Bill API [126580]**

When an email was updated in the Customer Bill API, it did not add or update the ar\_customer\_bill\_email table.

To address this, we created a new function to manage the emails that will be inserted into the AR\_Customer\_Bill\_Email table. This function will—

1. Validate that the
  - CustomerBillId needs to be >1
  - Email is not empty or has only spaces.
2. Check if the email does not exist. If it does not, add it as "Primary".
3. All emails that are added thru the API in the POST function will be saved as Primary
4. If the email exists, retrieve the first one that is not inactive.
5. If the existing email is inactive, activate it and ensure it is valid.

This function will also be used in the POST method.

## **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 6.2.0.20 or above.
- Server (where SedonaWeb 2.0 is installed) has Microsoft .NET 4.8 installed.