



# SedonaWeb/SedonaAPI 2.0 Release Notes

October 2025

Version 1.52.0

## Contents

|                                                                                                                                                              |   |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------|---|
| SedonaWeb 2.0 .....                                                                                                                                          | 3 |
| Enhancements/Features .....                                                                                                                                  | 3 |
| User Configurable Autopay Payment Processing Hold Date [118582] .....                                                                                        | 3 |
| Login Informational Message Above the Login Credentials can be Changed [00126933, 00140442] .....                                                            | 5 |
| Update Account Payment History Details .....                                                                                                                 | 6 |
| Application Corrections.....                                                                                                                                 | 7 |
| Document type drop down list in service code shows off the screen SedonaWeb2.0 [3581] .....                                                                  | 7 |
| Cannot see invoices for master account in SedonaWeb [00053666, 79194, 00140377] .....                                                                        | 7 |
| Would like the following fields removed from the invoice details screen in SedonaWeb 2.0 [63391] .....                                                       | 7 |
| SedonaWeb 2.0 issue with RMR values [65293] .....                                                                                                            | 7 |
| Credit calculation shows all credits (those already taken) SedonaWeb 2.0 [00073768, 80069, 88941,131911, 135539, 135857, 136157, 136395,137018,139771] ..... | 7 |
| SedonaWeb 2.0 service ticket category does not pull into SedonaOffice correctly [99577] .....                                                                | 8 |
| SedonaWeb 2.0 can't see check payments [00106169, 00140974] .....                                                                                            | 8 |
| Security concerns [125813] .....                                                                                                                             | 8 |
| New customers registering to the SedonaWeb customer portal see the last payment received on date as 12/30/1899 [129772] .....                                | 8 |
| When I first log into SedonaWeb the header and footer colors are not showing as red even though we set them to red [137369] .....                            | 8 |
| SedonaWeb 2.0 When viewing sub accounts the master RMR and the sub RMR are both reflecting the total combined RMR amount [140378] .....                      | 9 |
| SedonaWeb next payment date invalid for sub accounts [140782] .....                                                                                          | 9 |
| Sales Automation proposal will not sync with SedonaOffice if includes notes tab entries [00143795, 144256] .....                                             | 9 |
| SedonaAPI 2.0 .....                                                                                                                                          | 9 |
| Enhancements/Features .....                                                                                                                                  | 9 |
| Increased Length of Invoice Memo .....                                                                                                                       | 9 |
| Application Corrections.....                                                                                                                                 | 9 |



---

|                                                                            |    |
|----------------------------------------------------------------------------|----|
| API company login cannot view or edit permissions [00062854, 110298] ..... | 9  |
| GET /API/ACH fails [140929].....                                           | 10 |
| Special Upgrade/Installation Instructions .....                            | 11 |
| Supported Environments .....                                               | 11 |

## SedonaWeb 2.0

### Enhancements/Features

#### User Configurable Autopay Payment Processing Hold Date [118582]

We added two features for users configuring the payment processing options in SedonaWeb:

- Users can configure the day of the month for the Autopay capability.
- Users can give customer users who log into the customer portal the option to select the day of the month for payments.

To see this, log into SedonaWeb 2.0 and click Preferences. Scroll down the list to find Customer Portal - Payment methods - Autopay – DOM. The default is 1.

| Company/Branch Preferences                                    |                                                                              |         |
|---------------------------------------------------------------|------------------------------------------------------------------------------|---------|
| <div>Branch <span>Company Preferen...</span></div>            |                                                                              |         |
| Drag a column header and drop it here to group by that column |                                                                              |         |
| Name                                                          | Description                                                                  | Value   |
| Customer Portal - Invoice- Show Sales Person                  | Customer Portal - Invoice- show sales person                                 | false   |
| Customer Portal - Invoice- Show Tax Group                     | Customer Portal - Invoice- show tax group                                    | false   |
| Customer Portal - Invoice- Show Warehouse                     | Customer Portal - Invoice- show warehouse                                    | false   |
| Customer Portal - Invoices                                    | Customer Portal - access invoices                                            | true    |
| Customer Portal - Pay Invoices                                | Customer Portal - pay invoices                                               | true    |
| Customer Portal - Payment History                             | Customer Portal - access payment history                                     | true    |
| Customer Portal - Payment Methods                             | Customer Portal - access payment methods                                     | true    |
| Customer Portal - Payment Methods- Autopay - DOM              | Customer Portal - payment method auto hold day.                              |         |
| Customer Portal - Payment Methods- Autopay- Fixed             | Customer Portal - payment method auto hold day cannot be edited by the user. | false   |
| Customer Portal - RMR                                         | Customer Portal - access RMR                                                 | false   |
| Customer Portal - Site Listing                                | Customer Portal - access site listing                                        | true    |
| Customer Portal - Upload Documents                            | Customer Portal - upload documents                                           | false   |
| Customer Portal - View Service Ticket Details                 | Customer Portal - view service ticket details                                | true    |
| Customer Portal - View Service Tickets                        | Customer Portal - view service tickets                                       | true    |
| Customer Recurring ItemCode                                   | Customer Recurring ItemCode                                                  | N/A     |
| Customer Recurring RMR Reason                                 | Customer Recurring RMR Reason                                                | New RMR |
| Customer Relation Code                                        | Customer Relation Code                                                       | N/A     |
| Customer Service Company Code                                 | Customer Service Company Code                                                | N/A     |
| Customer Service Level Code                                   | Customer Service Level Code                                                  | N/A     |
| Customer Site Tax Group                                       | Customer Site Tax Group                                                      | N/A     |

Click Edit to change the value. The dropdown has 1 to 28 as options to select. This is the value that customer users will see when they log into their accounts.

Under the Branch drop-down, select a Branch (the Branch must be selected for customer users who have web access).

To give customer users the option to select the day of the month or prevent them from selecting a day, log into SedonaWeb 2.0 and click Preferences. Scroll down the list to find Customer Portal - Payment methods - Autopay – Fixed.

Click Edit to change the value. If this is set to true, customer users cannot change the Auto Hold Day for payments.

**Edit Credit Card**

|                        |                                                                      |
|------------------------|----------------------------------------------------------------------|
| Card Type              | VISA                                                                 |
| Last Four Digits       | 1111                                                                 |
| Name on Card           | Testing Bug 21531                                                    |
| Expiration Date        | 10 / 30                                                              |
| Billing Street Address | <input type="text" value="1234 Bug Ln"/>                             |
| Postal Code            | <input type="text" value="28625"/>                                   |
| Procurement Code       | <input type="text"/>                                                 |
|                        | <input checked="" type="checkbox"/> Use card for auto bill payment ? |
| Auto Hold Day ?        | <div>1</div>                                                         |
|                        | <input checked="" type="checkbox"/> Suppress Invoice Printing ?      |

When this setting is set to false, customer users can change the Auto Hold Day for payments and will see this when they log into the customer portal:

Home Site Listing RMR Invoices Payments Service Documents Settings Logout

### Edit Credit Card

|                        |                   |
|------------------------|-------------------|
| Card Type              | VISA              |
| Last Four Digits       | 1111              |
| Name on Card           | Testing Bug 21531 |
| Expiration Date        | 10 / 30           |
| Billing Street Address | 1234 Bug Ln       |
| Postal Code            | 28625             |
| Procurement Code       |                   |

☒ Use card for auto bill payment

Auto Hold Day

- 1
- 2
- 3
- 4
- 5
- 6

Invoice Printing

**Login Informational Message Above the Login Credentials can be Changed [00126933, 00140442]**

On the customer portal, the text “Use a local account to log in” appeared above the UserName field. This was confusing customer users. This text now defaults to “Login using your credentials.”

We added a company preference to give users the option to change the login text.

To see this, log into SedonaWeb 2.0 and click Preferences. Scroll down to the preference called **Login Page Account Text**. Click Edit to change the text and click Save when finished.

| Name                                  | Description                                                                                   | Value                                                                                           | Category |                      |
|---------------------------------------|-----------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------|----------|----------------------|
| Footer Image                          | Web footer image (located in Content/Images/SedonaWeb, use this or Footer Lines but not both) |                |          | <a href="#">Edit</a> |
| Footer Line 1                         | Appears in the web footer (use this or Footer Image but not both)                             | Testing footer line 1                                                                           |          | <a href="#">Edit</a> |
| Footer Line 2                         | Appears in the web footer (use this or Footer Image but not both)                             | Testing footer line 2                                                                           |          | <a href="#">Edit</a> |
| Footer Line 3                         | Appears in the web footer (use this or Footer Image but not both)                             | Testing footer line 3                                                                           |          | <a href="#">Edit</a> |
| Header Bar Color                      | HEX color code for the header bar                                                             | #ed2011                                                                                         |          | <a href="#">Edit</a> |
| Header Bar Text Color                 | HEX color code for the header bar text                                                        | #89ed2b                                                                                         |          | <a href="#">Edit</a> |
| Header Logo Image                     | Image at the top of every page (located in Content/Images/SedonaWeb)                          |                |          | <a href="#">Edit</a> |
| Home Page Message                     | Text displayed on the home page. HTML markup is allowed.                                      | This is the welcome message                                                                     |          | <a href="#">Edit</a> |
| Include CORS                          | Include CORS                                                                                  | 1                                                                                               |          | <a href="#">Edit</a> |
| Include CS System                     | Include CS System                                                                             | 1                                                                                               |          | <a href="#">Edit</a> |
| Include Emergency Contacts In Systems | Include Emergency Contacts In Systems                                                         | 1                                                                                               |          | <a href="#">Edit</a> |
| License Terms and Agreement           |                                                                                               | To view the text use edit button                                                                |          | <a href="#">Edit</a> |
| Log JSON Requests                     | Log JSON Requests                                                                             | 0                                                                                               |          | <a href="#">Edit</a> |
| Log JSON Responses                    | Log JSON Responses                                                                            | 0                                                                                               |          | <a href="#">Edit</a> |
| Login Message Description             | Login Message Description                                                                     | If you have not visited this site before then you need to create a new account. Please click on |          | <a href="#">Edit</a> |
| Login Message Header                  | Login Message Header                                                                          | Welcome                                                                                         |          | <a href="#">Edit</a> |
| Login Page Account Text               | Login page account text                                                                       | Login with valid credentials                                                                    |          | <a href="#">Edit</a> |
| Login Page Background Image           | Background image for the login page                                                           |                |          | <a href="#">Edit</a> |
| Login Page Background Image Opacity   | Background image percentage opacity for the login page                                        | 40                                                                                              |          | <a href="#">Edit</a> |
| Login Page Error Text Color           | HEX color code for the login page error text                                                  | #07fbaa                                                                                         |          | <a href="#">Edit</a> |

This text will be shown on the customer portal above the UserName field.

## Update Account Payment History Details

We improved the visual elements on many pages to show the text more information, align column headings, or show page header and footer colors:

- The details page now shows details for payments made by check and EFT (invoice, advance deposit, and miscellaneous income)
- Advance deposit now shows the Job ID
- The customer address is hidden from payment history detail when the payment type is check
- These columns are narrower: Date, Payment Method, Amount
- Added right alignment to columns (the header alignment can look centered because of the three dots for the filter)
- Removed right alignment for date and payment method columns on master customer Account Payment History
- Fixed an issue with delete credit card that was showing an error.
- Updated pages to reflect the header and footer branch color: RMR, Bill To, Invoices, Payment Method, and Payment History

## **Application Corrections**

### **Document type drop down list in service code shows off the screen SedonaWeb2.0 [3581]**

If users attempted to add a document to a service ticket in SedonaWeb 2.0, the document type drop down list moved to the bottom of the screen and making it difficult to go through the list. This was corrected in a previous release for SedonaWeb 2.0 in version 1.50.0.

### **Cannot see invoices for master account in SedonaWeb [00053666, 79194, 00140377]**

When users logged into a Master Account and clicked the Invoice tab, nothing happened. We fixed the tab so it is like the Invoice tab in the customer account, so that users can see invoices for a master account.

### **Would like the following fields removed from the invoice details screen in SedonaWeb 2.0 [63391]**

We added preferences to hide fields from the invoice details page for master customers and sub accounts. To see these preference settings, company users log into their SedonaWeb 2.0 company and click preferences. Users can hide these fields so that they are not visible to customer users on the customer portal:

- Category (Preferences > Customer Portal > Invoice – Show Category)
- A/R Account (Preferences > Customer Portal > Invoice – Show A/R Account)
- Tax Group (Preferences > Customer Portal > Invoice – Show Tax Group)
- Aging Date (Preferences > Customer Portal > Invoice – Show Aging Date)
- Branch (Preferences > Customer Portal > Invoice – Show Branch)
- Warehouse (Preferences > Customer Portal > Invoice – Show Warehouse)
- Salesperson (Preferences > Customer Portal > Invoice – Show Sales Person)

To hide a field from the invoice details page, change the preference setting to false.

### **SedonaWeb 2.0 issue with RMR values [65293]**

SedonaWeb 2.0 displayed incorrect values for the RMR. To resolve this, we are correctly splitting the two RMRs for master and sub account RMR.

### **Credit calculation shows all credits (those already taken) SedonaWeb 2.0 [00073768, 80069, 88941, 131911, 135539, 135857, 136157, 136395, 137018, 139771]**

On a master account the dashboard showed the incorrect value for credit. SedonaWeb displayed credits previously taken and customers thought those credits were available to take. We fixed the credit value to match the value in SedonaOffice.

### **SedonaWeb 2.0 service ticket category does not pull into SedonaOffice correctly [99577]**

The tickets created in SedonaWeb 2.0 were given a wrong category. To fix this, we added ServiceCompanyId and CategoryId, which are not visible to users, to the service ticket before saving it in the database to ensure it saves to the correct category.

### **SedonaWeb 2.0 can't see check payments [00106169, 00140974]**

SedonaWeb 2.0 was using EFT history to record payments instead of payment history. This created two problems: 1) it was using all EFT payments, even rejected ones. 2) it was missing all payments that were not EFT. Users needed this payment screen to pull from the customer payments, not customer eft history. We changed SedonaWeb 2.0 to load payments instead of EFT History.

### **Security concerns [125813]**

We addressed the security concerns by tightening the customer user access to payment information, systems, sites, bank accounts, credit card accounts, service tickets, invoices, customer accounts, master customer accounts, and RMR.

### **New customers registering to the SedonaWeb customer portal see the last payment received on date as 12/30/1899 [129772]**

New customers that had not made any payments would show that the last payment was received in 1899. To fix this, we hid the Received On amount when the Last Payment is 0 and there is a Current Balance.

### **When I first log into SedonaWeb the header and footer colors are not showing as red even though we set them to red [137369]**

In the company preference settings, we made these changes to address reported issues:

- Added a setting called Login Page Background Image Opacity that controls the opacity in the image (enter a numeric value: 0 is no opacity; numbers higher than 0 increase opacity)
- Added settings called Login Page Error Text Color and Login Page Text Color to change the color of the error text on the login page and the color of the text shown on the login page. In each of these fields, select a color

In the host preference settings, we made these changes to address reported issues:

- Added settings for the page header color (called Header Bar Color) and page footer color (called Footer Bar Color). In each of these fields, select a color for the page header and footer colors
- Added settings for page header text color (called Header Bar Text Color) and page footer text color (called Footer Bar Text Color). In each of these fields, select a color for the header and footer text colors

- Added a setting called Login Page Background Image Opacity that controls the opacity in the image (enter a numeric value: 0 is no opacity)
- Added settings called Login Page Error Text Color and Login Page Text Color to change the color of the error text on the login page and the color of the text shown on the login page. In each of these fields, select a color.

### **SedonaWeb 2.0 When viewing sub accounts the master RMR and the sub RMR are both reflecting the total combined RMR amount [140378]**

We updated the calculation to sum RMR that bills to sub accounts and RMR that bills to master accounts.

### **SedonaWeb next payment date invalid for sub accounts [140782]**

The wrong date was shown on the Auto Bill Pay. To resolve this, we are now getting the Next payment from Hold\_Date on ACH table that has a Transaction Status of Ready. We added the Total Amount to show the Total payment that will be billed that day. If there is not an upcoming date, the line “Next Payment ....” and the new line “Total Amount” are hidden.

### **Sales Automation proposal will not sync with SedonaOffice if includes notes tab entries [00143795, 144256]**

When inserting a new job along with associated notes, the process of adding the job notes did not correctly assign the JobID so the notes were not linked to the newly created Job. To fix this, we are ensuring the JobID is correctly assigned to the job note when the job is created.

## **SedonaAPI 2.0**

### **Enhancements/Features**

#### **Increased Length of Invoice Memo**

We modified the CustomerInvoice endpoints by increasing the memo length to hold 4,000+ characters.

### **Application Corrections**

#### **API company login cannot view or edit permissions [00062854, 110298]**

The API company login could not view or edit permissions.

To fix this, we made the following changes:

- We updated the Role Group to allow the preinstalled groups to show details.

- We disabled the Edit and Delete icons for the preinstalled groups:

Role Groups

[Add Role Group](#)

| Id | Group Name        | Group Description |                                                                     |
|----|-------------------|-------------------|---------------------------------------------------------------------|
| 1  | Salesperson23     | Salesperson       | <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Details</a> |
| 6  | Jr. Tech          | Jr. Tech          | <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Details</a> |
| 7  | Subcontractor     | Subcontractor     | <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Details</a> |
| 8  | Sr. Tech          | Sr. Tech          | <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Details</a> |
| 9  | Project Manager   | Project Manager   | <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Details</a> |
| 10 | Manager           | Manager           | <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Details</a> |
| 11 | SubProjectManager | SubProjectManager | <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Details</a> |
| 50 | Admin23           |                   | <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Details</a> |
| 53 | 1234              | 12345             | <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Details</a> |

10 items per page 1 - 9 of 9 items

- We added a message “(Preinstalled group cannot be deleted or modified)” that appears when clicking the name or delete.
- We hid the delete button for the preinstall groups on the Detail Role Group Page.
- We changed the Cancel button text to Back on the Detail and Delete Pages.

### GET /API/ACH fails [140929]

To resolve the error from the GET API/ACH, we removed BitOptions and renamed ProcurementCode to Procurement\_Code in the AR\_ACH.cs and AR\_ACHExtension.cs and removed AllowInvoice and AllowAdvDeposit from ACH.cs.

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