Preparation Requirements for SedonaOffice 6.1+ Installation

SedonaOffice 6.1+ now uses a Rest API to communicate and integrate with Forte. This will require some additional setup and configuration in SedonaOffice, SedonaWeb, and with Forte.

Submit/Upload and Capture all EFT Payment Batches:

- Before upgrading to 6.0, please be sure to submit/upload and capture all EFT payment batches.

Server/Client Requirements:

- Upgrade to Microsoft .Net 4.6.1 or newer

Forte Account Setup:

This new API process with Forte requires access to Forte's Dex Portal.

1. Contact Forte to receive a Dex Account invite as well as a sandbox account for your testing.

   Forte Contact:

   Heather Lawson

   customerservice@forte.net

   integration@forte.net

   866-290-5400 x 766

2. Request a Dex Invite and/or Sandbox setup credentials
3. Dex invite will come from **Dex@forte.net**
4. You should receive a Dex invite within 1-2 business days
5. Once you receive your invite, follow Forte's instructions to register your account which can be found here:

   https://console.forte.net/help/merchant/#users/registering_your_account.htm%3FTocPath%3DHome%7C_____1

You will need to obtain the following information from the Dex Portal to complete SedonaOffice's EFT Setup window in SedonaSetup.

- Merchant ID
- Access ID
- Secure Key
- Organization ID

Accessing Required Information from the Dex Portal:

Merchant ID and Organization ID can be found on the Locations tab:
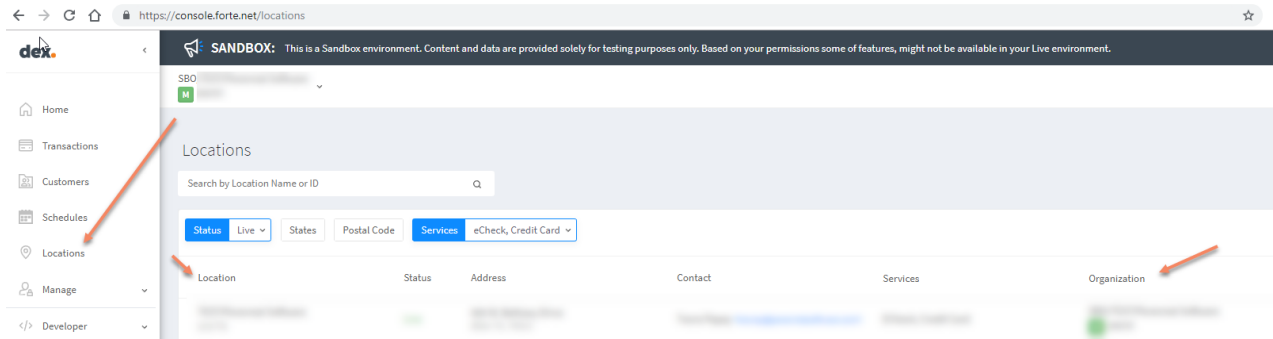
You will need to generate the API Access ID and the API Secure Key from the Dex Portal under the Developer / API Credentials tab.

For more information about generating API Credentials, review Forte's documentation:

https://console.forte.net/help/merchant/#admin/working_with_api_keys.htm%3FTocPath%3DDeveloper%7C_____1

FSU Updates

- Download the latest updates for the FSU app: https://www.apple.com/ios/app-store/
- Must have iOS 11 or newer.
- FSU credit card readers are not allowed in SedonaOffice 6.0.

Install SedonaOffice 6.0

SedonaWeb Setup

If your company uses SedonaWeb, IT will update your SedonaWeb version at the same time as your SedonaOffice version. This is to ensure the highest level of PCI compliance throughout all applications.

SedonaCloud/SedonaAPI 2.0 Setup

If your company uses the SedonaAPI, IT will update your SedonaAPI version at the same time as your SedonaOffice version. This is to ensure compatibility with the Sales Automation module.

If you are not a SedonaCloud customer, please review the requirements for the new API before requesting the update. For a copy of pre-install requirements please contact:

sedonaoffice.support@boldgroup.com

Performing the Update

➢ Create support ticket via SedonaWeb or email sedonaoffice.support@boldgroup.com to schedule 6.1+ update

➢ If you are currently on version 6.0+ you may download the update from the SedonaOffice Installer and follow the prompts to install SedonaOffice 6.1+