Checklist for Your Required Upgrade to SedonaOffice 6.2.0.16

Use this checklist to facilitate your software upgrade from SedonaOffice version 5.7 to version 6.2.0.16 to ensure ongoing compatibility with the CSG Forte payments platform. You are required to make this upgrade if (1) you use the Forte payments integration for payment processing; and (2) you are operating SedonaOffice version 5.7 or earlier. *Visit our resource center to learn more about this software upgrade.*

⚠️ You must complete this upgrade by April 30, 2024 or you will lose the ability to process payments in SedonaOffice using Forte.

Step 1 - Open support case to initiate upgrade	
IMPORTANT: **Open a support case** to begin the upgrade process. • Please do not attempt to upgrade your system without our support team. Without proper checks, the upgrade process could cause reconciliation issues and have a negative impact on your system and business operations.	☐

Step 2 - Gather information	
Get Developer DEX Credentials • Forte has a specific process for getting API information. If you do not already have these Developer credentials, please reach out to Forte to get access to them.	☐
Generate API Information • Once you have Developer DEX credentials, you will need to generate API information for the integration. Watch Forte's interactive tutorial to understand the process. • Please document the API information when it is generated. If not recorded, you will have to repeat this process to re-generate the information before inputting it into Sedona Office.	☐
Prepare the following information before your upgrade. This information is critical for a smooth transition: __ Identify integrations (WeSuite, SEBIS, SedonaWeb, etc.) and notify third-party providers that you are making this upgrade. __ Identify customizations. Do you have customization built using APIs? Do you have customer SQL jobs running? Do you have any other custom setup that could be disrupted? Do you use SedonaCheck, Check21, SedonaBarcode, SedonaEmail, SedonaWeb 1, SedonaSync V9? __ Is your system integrated with Manitou? Identify which version of Manitou you are using. __ Have you done any data work in the past? __ Have you completed any acquisitions that include payment methods? __ Have you completed any acquisitions of other Merchant IDs? __ How many databases need to be updated? __ How many servers need to be updated?	☐

Step 3 – Perform an application review	
Meet with your IT and technical teams to understand impact and review release notes.	☐
Enterprise: Confirm with your IT team that you are regularly backing up your data and validating your server health via a maintenance plan.	☐
Confirm follow-up dates with notified third-party integration providers and next actions.	☐
Confirm if your Sedona SQL/IIS servers are running the required version of .NET Framework 4.8.	☐
Verify that all servers & workstations accessing the SedonaOffice client have the current version of Microsoft WebView2 Runtime (The WebView2 runtime control is used by Microsoft Edge).	☐

Step 4 – Prepare for your upgrade

Your Bold Group support technician will meet with you to review the upgrade information and create an upgrade plan and timeline. Your technician will assess the complexity of your data and provide an estimate of how long the upgrade will take.	☐
Coordinate any third-party party integration support to align with post-upgrade validation.	☐
Enterprise: Prepare to take any necessary backups and snapshots of your data and server prior to the upgrade.	☐
Have your IT team confirm any pre-requisite server/software are in place for upgrade.	☐

Step 5 – Make the Upgrade	
Ensure your backups/snapshots are completed.	☐
Perform upgrade on date scheduled with your Bold Group support technician.	☐
Validate configuration match between versions and soft test of application functionality.	☐
Verify that your payments are submitting and settling in time to DEX.	☐
Communicate the change to internal teams and train staff on updated system.	☐
If you need post-upgrade support with third-party integrations, please reach out to the appropriate software provider.	☐
If you need post-upgrade support with your SedonaOffice environment, please reach out to the Bold Group support team by responding to or reopening your support case.	☐

Need help? Bold Group's support team is here to guide you through this update. Reach out to sedonaoffice_support@boldgroup.com for assistance.