Assign New Project to a PM

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Contents

Purpose

This document walks through the process of locating sales opportunities that have been closed/won and are ready to have a project created to deliver the product and services.

Projects are assigned after Noon on Wednesdays and Fridays only. ***Only opportunities that are closed/won before these times with all prepayment items confirmed paid will have a project created and assigned to a Project Manager.*** All others will remain in the queue until payment is received and the next scheduled assigning day.

Top of Document

Review Closed/Won Opportunities

To locate opportunities that are ready to have a project created, navigate to the list view created for these opportunities: CW Opp to Implementation QA list view.

Currently, all opportunities that have been closed/won will show in this list regardless of the status of prepayment requirements being completed. In the future, only opportunities that have had all prepayment requirements met will show in this queue. Until that time, resources that review and create projects from this list should NOT create a project until all prepayments have been received.

For each project on the list:

1. Ensure prepayments have been received
    1. Review the AR report for payments (pending access provided by Joel Smith)
    2. ***NO PROJECT SHOULD BE OPENED PRIOR TO ALL ONE TIME FEES PAYMENT!***
        1. Track all efforts to confirm payment under the Opportunity Chatter section
        2. When all OTFs have been paid, only then can a project be created.
2. Review the sales order via the Reviewing Sales Order process
3. Ensure the ‘Primary Contact’ and ‘Implementation Details” fields have been populated
    1. Refer to the sales rep on the opportunity for any missing information

Top of Document

Create Project From Template

After the sales opportunity has been reviewed and payment has been received for all prepayments, the project can now be created:

1. From the 'Description Information' section on the opportunity, click 'Implementation Project Template'
2. Select the appropriate template from the list
    1. For assistance see Project Templates

The project has been created and is available to update/assign via the list view Project Creation Queue.

Top of Document

Project Name

The next step in the process is changing the project name and confirming the project type is correct.

The project name should identify a summary of the project scope and follow a specific format:
Examples:

- SO – Customer X – Product/Module sold
    - Where SO – is the abbreviation of the main application, in this case, SedonaOffice.
        - AlarmBiller = AB
        - Manitou = Manitou
        - Stages = SGS
        - Managely = MG
    - Example: SO – Smith Alarm – API and SedonaX Mobile
    - Example: AB – Jones Alarm – New Implementation
- RW – Customer X – Rework Summary
    - Where RW stands for rework order to complete tasks that were not completed to scope on a closed project
    - Example: RW – Smith Alarm – Reinstall SedonaX

Confirm the project type is correct for the project and change if necessary:

- New Implementation - new Business Management or Alarm monitoring product implementation for new customer
- Migration - Existing customers moving from one Business Management application to another or Alarm product to another. Example: AlarmBiller to Managely or SedonaOffice to Managely
- Add-On - Existing customers purchased additional modules or licenses or service hours
- Walk In - Services hours quoted by the Services team for quick turn delivery
- Internal - test projects, scheduling projects, employee onboarding projects, etc
- Rework – project created to fix issues or finish incomplete tasks from a closed project

Top of Document

Assign Project to Project Manager

The final step is to assign the project to a Project Manager (PM). Every effort should be taken to balance the load amongst available project managers.

To assign a project, follow the steps below:

1. Open the Project Creation Queue
2. Locate the project in the list, and select the checkbox to the left of the Project Name on the same row as the project
3. Click the Change Owner button at the top right of the screen
4. Enter the Project Manager's name in the search box and click Submit
5. Ensure 'Send Notification' checkbox is selected
6. The project has now been assigned and an email sent to the Project Manager to notify them of their new project

Top of Document