

Project Templates for Services Project Creation

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Purpose

The purpose of this article is to describe the scenarios in which Services uses each type of project template. This will assist the Project Coordinator during project creation from Opportunities

Important Note: With the release of Template version control, the links to the template below may no longer link to the most current version of the template if the template was updated. Search for the same template name and locate the template with the highest Rev# at the end of the name.

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Acquisition Implementation

Used when an AlarmBiller or SedonaOffice customer acquires a new customer and needs to bring their acquisition's data into their application.

Template: [Acquisition Implementation](#)

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Add on Modules Implementation

Use for all add-on modules for AlarmBiller, SedonaOffice, Manitou, Sims EXCEPT Sedona-X see [SX App for SO](#) for Sedona-X module.

Template: [Add On-Modules Implementation](#)

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Alarm Automation Go Live Implementation

Use for new server implementations for Manitou and Sims projects.

Template: [Alarm Automation Go-Live Implementation](#)

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AlarmBiller Go-Live

Use for new AlarmBiller Implementations:

Template: [AlarmBiller Go-Live](#)

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Consulting Hours

Use this template for projects that were sold with consulting hours only.

Template: [Consulting Hours](#)

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Custom Development Implementation

Can be used for any product line EXCEPT stages (see [stages Customer Development](#)), when the customer requires custom development to their pre-existing implementation.

Template: [Custom Development Implementation](#)

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Data Conversion Implementation

Can be used for any product line when the customer only requires data conversion services.

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IaaS Project

Used for Manitou and Sims Cloud projects.

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Licensing Implementation - Alarm Monitoring

Use this template for additional license requests for Alarm Monitoring add on licenses

Template: [Licensing Implementation Alarm Monitoring](#)

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Licensing Implementation - Business Management

Use this template for additional license requests for all Business Management products including related add-on modules

Template: [Licensing Implementation Business Management](#)

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Managely Go Live

Use these templates for all Managely new customer implementations.

Template: [Managely Go-Live w/ Conversion](#)

Template: [Managely Go-Live w/o Conversion](#)

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Manitou Server Reinstallation

This template is used for reinstallation of Manitou Servers

Template: [Manitou Server Reinstallation](#)

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ManitouLITE Go Live

Use this template for ManitouLite upgrades, new implementations, and Manitou projects without data conversion.

Template: [ManitouLITE Go-Live](#)

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MediaGateway Installation

Use this template for a new MediaGateway (Server Install).

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MediaGateway Reinstallation

Use this template or a new MediaGateway (Server Install).

Template: [MediaGateway Reinstallation](#)

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Paas Cloud w/ Data Conversion

Use this template for a new Manitou Cloud PaaS sold with data conversion.

Template: [PaaS - Cloud w/ Data Conversion](#)

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Paas Cloud w/o Data Conversion

Use this template for a new Manitou Cloud PaaS sold without data conversion. The customer is either doing "manual" data entry and/or upgrading from Manitou On Premise to Manitou Cloud.

Template: [PaaS - Cloud w/o Data Conversion](#)

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PaaS Existing Manitou Customer

Use this template for implementing Paas for an existing Manitou Customer

Template: [Paas - Existing Manitou Customer](#)

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PBX Installation Template

Use this template when a customer purchases PBX Standard and/or PBX Enterprise.

Template: [PBX Installation Template](#)

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QuoteWerks Add On Licensing

This template is used when a customer purchases additional QuoteWerks Licenses

Tempate: [QuoteWerks Add On Licensing](#)

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SaaS Cloud w/ Data Conversion

Use this template for a new Manitou Cloud SaaS sold with data conversion.

Template: [SaaS - Cloud w/ Data Conversion](#)

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SaaS Cloud w/o Data Conversion

Use this template for a new Manitou Cloud SaaS sold without a data conversion. The customer is either doing "manual" data entry and/or upgrading from Manitou On Premise to Manitou Cloud.

Template: [SaaS - Cloud w/o Data Conversion](#)

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SaaS Existing Manitou Customer

This template is used for implementing SaaS for an existing Manitou customer

Template: [SaaS - Existing Manitou Customer](#)

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SedonaOffice Implementation

Use this template for net new SedonaOffice implementations.

Template: [SedonaOffice Implementation Project Template](#)

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SedonaOffice Server Migration

Use this template for SedonaOffice server migrations from an on prem to a cloud environment

Template: [SedonaOffice Server Migration](#)

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SedonaOffice Server Reinstallation

Use this template for SedonaOffice server reinstallations

Template: [SedonaOffice Server Reinstallation](#)

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SI_Plan Appliance

Use this for stages related product when an appliance is sold.

Template: [SI_Plan_Appliance](#)

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SI_Plan CyberReport

Use this for stages related product CyberReport when sold.

Template: [SI_Plan_CyberReport](#)

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Single Product Install

Use this template for Alarm Monitoring and on projects that involve a single product: a server reinstall, OpenVoice, or Training Gym.

Template: [Single Product Install](#)

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stages- Custom Development Implementation

Use for stages projects when there is a custom development request.

Template: [stages - Custom Development Implementation](#)

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stages- Implementation

Use this for net new stages implementations.

Template: [stages - Standard Implementation](#)

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Stealth Server Installation

Use this for Alarm Monitoring projects that require a Stealth Server installation

Template: [Stealth Server Installation](#)

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SX App for SO

Use this template for Sedona-X implementations when the customer uses SedonaOffice. If the customer is a Managely or AlarmBiller customer, please use the "[add on module](#)" template

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WeSuite Project Template

Use this template when the customer is purchasing WeSuite and already has Financial Management software in place.

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