

# SedonaOffice Additional User License Implementation

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## Purpose

This document walks a Project Manager (PM) through the steps necessary to implement the purchase of additional user seats for SedonaOffice.

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## Prerequisites

Although the installation is quick, the customer will need to exit SedonaOffice during the installation time for approximately 30 minutes.

Review the sales order to confirm the number of licenses sold, are they individual licenses or a 5-pack? If any questions on the quantity sold, contact the sales rep on the Opportunity.

Important Note: Add-on licenses must be delivered within 4-5 business days

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## Implementation Steps

The following steps are used to implement the new licenses:

1. For cloud/hosted installs, request any TSP licenses required via the process step included in the article [TSPlus License Request](#)
2. Schedule license installation with Install Technician
  - a. Estimated Time: 30 min
  - b. Install can be done at the same time as other tasks, tech can multitask this item
  - c. Update task Chatter to include information on what is being installed and quantity of licenses as below:

- i. Quantity to add:
      - ii. Total Quantity customer should have (previous count + licenses added for this sale):
    - d. Do not change the task status to 'Scheduled' until the customer confirms the time
    - e. If a Professional Services Technician is not available, and a case is used to request assistance from another department, follow the process [Requesting Help During Delivery of an Assigned Task](#) and add the following will need to be included in the case:
      - i. Case details:
        - i. License quantity to add:
        - ii. Total quantity the customer should have after installation:
        - iii. Time frame between 8am and 6pm ET the Bold Group resource can apply the licenses
      - ii. Included the customer contact information and list yourself as the Secondary case owner
3. Send Kick off email to the customer
  - a. Template: 'SedonaOffice Licensing'
    - i. Update template to include scheduled technician date and time
4. The customer confirms install time
  - a. Update install task status to 'Scheduled'
  - b. Update task description to include install time in the technicians time zone
  - c. Create an Outlook appointment in the Bold Project Management calendar for the technician and the customer if the customer is on prem to provide access to their server
    - i. Included details of what will be installed
  - d. If the customer does not confirm the time before the scheduled date, reschedule the task for the technician and resend the kick-off email with the new date/time
5. Technician completes installation
  - a. The technician will enter a timecard on the task, add notes on completion in Chatter and mark the task

complete

6. PM completes the project

a. Mark all tasks complete

b. Update Project Stage to 'Complete'

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