

How to Quote a Transfer Fee

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Use this process when a customer acquires a new company. We will need to apply a transfer fee based off their MSA.



NOTE: The customer must have agreed upon language in their MSA for transfer fees.

- 1. Create amendment opportunity



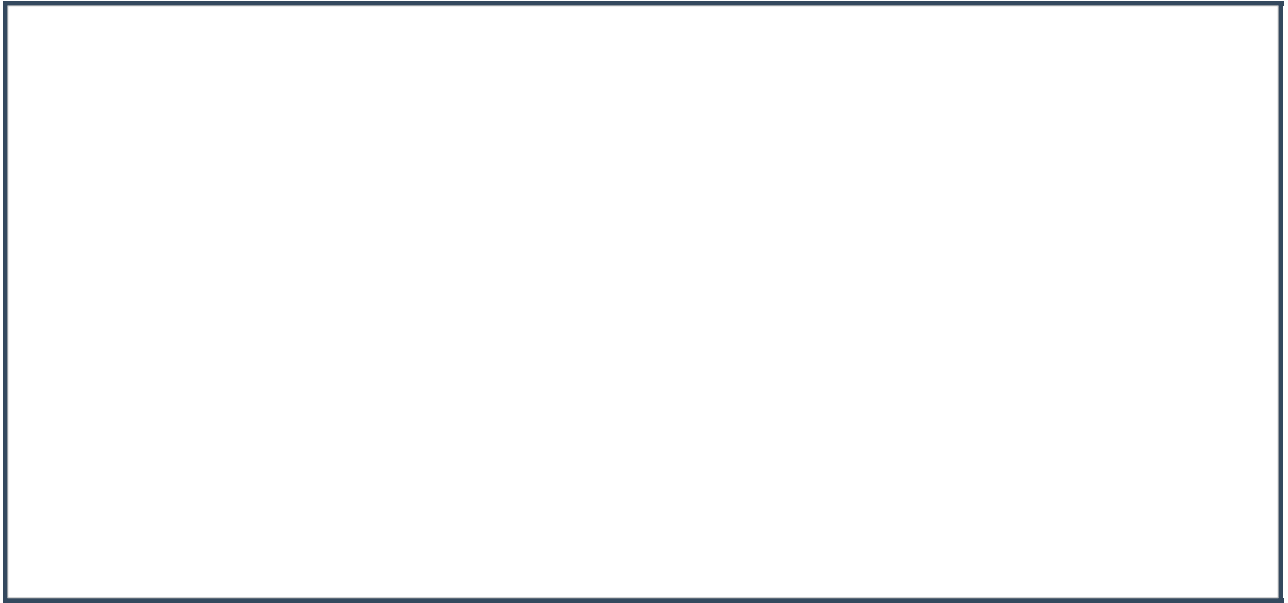
2. Add Transfer SKU under Add Products

- Add **quantity**. Quantity equals total number of SedonaOffice users the acquired company had at purchase
- Click **Save**



3. Add Notes

- In the notes field, add the following language:
 - Transfer fee for acquired company
 - {Company Name}
 - {SO/AB/MG #}
 - {Company #}
- Click **Save**



4. Complete the final submission and approval process.