

Contracts Cancelled

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Purpose

Ensure all departments complete the required actions when a customer contract is cancelled to prevent billing errors and maintain accurate system records.

Billing

1. Review the Contract Cancelled notification.
2. Do not bill the customer's Recurring Monthly Revenue (RMR) for the cancelled contract.
3. Verify no future invoices will be generated for the cancelled contract.
4. Document the billing action taken.

Operations

1. Down-sell the contract or quote in Salesforce.
2. Remove the software from Salesforce if the cancellation is a full platform cancellation.
3. Confirm Salesforce reflects the customer's cancelled contract status.

Professional Services

1. Cancel any open project associated with the cancelled contract.
2. Update the project status to Cancelled.
3. Confirm no additional work is scheduled.

Completion checklist

1. Confirm RMR billing has stopped.
2. Confirm the Salesforce contract or quote has been down-sold.
3. Confirm software has been removed from Salesforce, if applicable.
4. Confirm all open Professional Services projects have been cancelled.
5. Confirm all applicable notes have been added before closing the request.

This process helps ensure accurate billing, system integrity, and proper closure of cancelled customer accounts.
