

Terminated by Customer

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Purpose

Ensure all departments complete the required actions when a customer terminates their contract before the end of the agreement, including billing the remaining contractual obligation.

Billing

1. Review the Terminate by Customer notification.
2. Open the specified quote associated with the termination.
3. Bill the customer for the remainder of the contractual obligation on the specified quote.
4. Verify the final invoice reflects the remaining contract balance according to the agreement.
5. Confirm no additional RMR invoices will generate after the contractual obligation has been fulfilled.
6. Document the billing action taken.

Operations

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

Professional Services

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

Completion checklist

1. Confirm the customer has been billed for the remaining contractual obligation on the specified quote.
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 ensures the customer's contractual financial obligations are fulfilled while maintaining accurate billing records, project status, and Salesforce data.
