

SedonaOffice OnPrem to Cloud

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Purpose

Ensure all departments complete the required actions when a customer migrates from SedonaOffice On-Prem to SedonaOffice Cloud, maintaining accurate billing, Salesforce records, and system configuration.

Billing

1. Open the associated Closed Won Opportunity in Salesforce.
2. Review the approved Quote or Order Form.
3. Confirm:
 - Customer name
 - Migration type
 - Effective migration date
 - Approved SKUs and pricing
4. Open the customer account in Managely.
5. Identify all active SedonaOffice On-Prem SKUs.
6. End-date all applicable SedonaOffice On-Prem SKUs effective the day prior to the approved SedonaOffice Cloud go-live date.
7. Verify no SedonaOffice On-Prem SKUs remain active after the end date.
8. Add all approved SedonaOffice Cloud SKUs exactly as listed on the approved Opportunity or Quote.
9. Set the effective date for all SedonaOffice Cloud SKUs to the approved migration date.
10. Verify before saving:
 - SKU numbers
 - Descriptions
 - Quantities
 - Billing frequency
 - Pricing or RMR
11. Save all billing updates in Managely.

Invoice handling

1. Review whether an invoice has already generated for the SedonaOffice On-Prem service period.
2. If an incorrect invoice has generated, void the invoice if no payment has been applied.
3. If payment has been applied, follow standard credit or refund procedures.
4. Generate or rebill the invoice using the approved SedonaOffice Cloud SKUs effective the approved start date.
5. Validate the invoice before posting.
6. Confirm:
 - Correct billing dates
 - Correct service platform
 - Correct billing amounts
 - No duplicate billing

Required internal notes

1. Add internal account notes documenting:
 - Date SedonaOffice On-Prem SKUs were end-dated
 - Date SedonaOffice Cloud SKUs were added
 - Invoice action taken
 - Related Opportunity number
 - Related Quote number
 - Name of the person completing the updates

Operations

1. Down-sell the SedonaOffice On-Prem contract in Salesforce.
2. Update the software designation in Salesforce from SedonaOffice On-Prem to SedonaOffice Cloud.
3. Confirm Salesforce reflects the customer's active SedonaOffice Cloud subscription.

Project Management Office

1. Confirm the customer has successfully transitioned to SedonaOffice Cloud.
2. Turn off the SedonaOffice On-Prem environment after migration is confirmed complete.
3. Confirm the legacy environment has been decommissioned.

Completion checklist

1. Confirm SedonaOffice On-Prem SKUs have been end-dated.
 2. Confirm SedonaOffice Cloud SKUs have been added with the correct effective date.
 3. Confirm billing has been validated.
 4. Confirm invoice corrections have been completed, if applicable.
 5. Confirm Salesforce has been updated.
 6. Confirm the SedonaOffice On-Prem environment has been decommissioned.
 7. Confirm Salesforce, Managely, and invoicing are aligned.
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