

SedonaOffice Cloud to OnPrem

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Purpose

Ensure all departments complete the required actions when a customer migrates from SedonaOffice Cloud to SedonaOffice On-Prem, 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 Cloud SKUs.
6. End-date all applicable SedonaOffice Cloud SKUs effective the day prior to the approved SedonaOffice On-Prem go-live date.
7. Verify no SedonaOffice Cloud SKUs remain active after the end date.
8. Add all approved SedonaOffice On-Prem SKUs exactly as listed on the approved Opportunity or Quote.
9. Set the effective date for all SedonaOffice On-Prem 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 Cloud 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 On-Prem 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 Cloud SKUs were end-dated
 - Date SedonaOffice On-Prem 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 Cloud contract in Salesforce.
2. Update the software designation in Salesforce from SedonaOffice Cloud to SedonaOffice On-Prem.
3. Confirm Salesforce reflects the customer's active SedonaOffice On-Prem subscription.

Project Management Office

1. Provision and activate the customer's SedonaOffice On-Prem environment.
2. Confirm the customer has successfully transitioned to SedonaOffice On-Prem.
3. Decommission the SedonaOffice Cloud environment only after confirming the migration is complete.

Completion checklist

1. Confirm SedonaOffice Cloud SKUs have been end-dated.
 2. Confirm SedonaOffice On-Prem 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 activated.
 7. Confirm the SedonaOffice Cloud environment has been decommissioned.
 8. Confirm Salesforce, Managely, and invoicing are aligned.
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