SedonaOffice to Managely

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Purpose

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

Project Management Office

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

Completion checklist

1. Confirm SedonaOffice SKUs have been end-dated.
2. Confirm Managely 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 environment has been decommissioned.
7. Confirm Salesforce, Managely, and invoicing are aligned.