

AlarmBiller to SedonaOffice

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Purpose

Ensure all departments complete the required actions when a customer migrates from AlarmBiller to SedonaOffice, 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 AlarmBiller.
5. Remove all legacy AlarmBiller SKUs associated with the customer's billing.
6. Open Managely
7. Create the customer's account in Managely
8. Add all approved SedonaOffice SKUs exactly as listed on the approved Opportunity or Quote.
9. Verify before saving:
 - SKU numbers
 - Descriptions
 - Quantities
 - Billing frequency
 - Pricing or RMR
10. Save all billing updates.

Special module handling

1. Review the approved SedonaOffice quote for eForms, SedonaX, and SalesAutomation.
2. If the quote includes eForms, SedonaX, or SalesAutomation, remove the old AlarmBiller SKUs for those modules.
3. Add the new SedonaOffice SKUs for the applicable modules.
4. Do not terminate the AlarmBiller environment when these modules require AlarmBiller to remain open.
5. Leave the AlarmBiller account active and pointed to SedonaOffice for billing only.

Operations

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

Project Management Office

1. For a full migration, terminate the customer's AlarmBiller environment after migration is confirmed complete.

2. If eForms, SedonaX, or SalesAutomation require AlarmBiller to remain open, do not terminate the AlarmBiller environment.
3. Confirm the AlarmBiller environment is either terminated or left active for SedonaOffice billing only, based on the approved quote.

Completion checklist

1. Confirm AlarmBiller SKUs have been removed.
 2. Confirm SedonaOffice SKUs have been added correctly.
 3. Confirm billing has been validated.
 4. Confirm Salesforce has been updated.
 5. Confirm the software designation has been updated to SedonaOffice.
 6. Confirm the AlarmBiller environment has been terminated for a full migration.
 7. Confirm the AlarmBiller environment remains active and pointed to SedonaOffice billing only, if applicable.
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