

SIMS to Stages

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Purpose

Ensure all departments complete the required actions when a customer migrates from SIMS to Stages, maintaining accurate billing, Salesforce records, and financial 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 QuickBooks Online.
5. Identify all active SIMS SKUs.
6. End-date all applicable SIMS SKUs effective the day prior to the approved Stages go-live date.
7. Verify no SIMS SKUs remain active after the end date.
8. Open the customer account in NetSuite.
9. Add all approved Stages SKUs exactly as listed on the approved Opportunity or Quote.
10. Set the effective date for all Stages SKUs to the approved migration date.
11. Verify before saving:
 - SKU numbers
 - Descriptions
 - Quantities
 - Billing frequency
 - Pricing or RMR
12. Save all billing updates in NetSuite.

Invoice handling

1. Review whether an invoice has already generated in QuickBooks Online for the SIMS 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 in NetSuite using the approved Stages SKUs effective the migration date.
5. Validate the invoice before posting.
6. Confirm:
 - Correct billing dates
 - Correct service platform
 - Correct billing amounts
 - No duplicate billing between QuickBooks Online and NetSuite

Required internal notes

1. Add internal account notes documenting:
 - Date SIMS SKUs were end-dated in QuickBooks Online
 - Date Stages SKUs were added in NetSuite
 - Invoice action taken
 - Related Opportunity number
 - Related Quote number
 - Name of the person completing the updates

Operations

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

Project Management Office

1. Confirm the customer's Stages environment has been provisioned and is fully operational.
2. Verify the customer has successfully transitioned from SIMS to Stages.
3. Coordinate decommissioning of the SIMS environment after the migration is confirmed complete.

Completion checklist

1. Confirm SIMS SKUs have been end-dated in QuickBooks Online.
 2. Confirm Stages SKUs have been added in NetSuite 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 SIMS environment has been decommissioned.
 7. Confirm Salesforce, QuickBooks Online, NetSuite, and invoicing are aligned.
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