

SIMS to Manitou

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Purpose

Ensure all departments complete the required actions when a customer migrates from SIMS to Manitou, 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 Manitou go-live date.
7. Verify no SIMS SKUs remain active after the end date.
8. Open the customer account in Xledger.
9. Add all approved Manitou SKUs exactly as listed on the approved Opportunity or Quote.
10. Set the effective date for all Manitou 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 Xledger.

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 Xledger using the approved Manitou 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 Xledger

Required internal notes

1. Add internal account notes documenting:
 - Date SIMS SKUs were end-dated in QuickBooks Online
 - Date Manitou SKUs were added in Xledger
 - 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 Manitou.
3. Confirm Salesforce reflects the customer's active Manitou subscription.

Project Management Office

1. Confirm the customer's Manitou environment has been provisioned and is fully operational.
2. Verify the customer has successfully transitioned from SIMS to Manitou.
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 Manitou SKUs have been added in Xledger 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, Xledger, and invoicing are aligned.
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