

Manitou Cloud to OnPrem

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Purpose

Ensure all departments complete the required actions when a customer migrates from Manitou Cloud to Manitou 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 Xledger.
5. Identify all active Manitou Cloud SKUs.
6. End-date all applicable Manitou Cloud SKUs effective the day prior to the approved Manitou On-Prem go-live date.
7. Verify no Manitou Cloud SKUs remain active after the end date.
8. Add all approved Manitou On-Prem SKUs exactly as listed on the approved Opportunity or Quote.
9. Set the effective date for all Manitou 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 Xledger.

Invoice handling

1. Review whether an invoice has already generated for the Manitou 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 Manitou 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 Manitou Cloud SKUs were end-dated
 - Date Manitou 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 Manitou Cloud contract in Salesforce.
2. Update the software designation in Salesforce from Manitou Cloud to Manitou On-Prem.
3. Confirm Salesforce reflects the customer's active Manitou On-Prem subscription.

Project Management Office

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

Completion checklist

1. Confirm Manitou Cloud SKUs have been end-dated.
2. Confirm Manitou 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 Manitou On-Prem environment has been activated.
7. Confirm the Manitou Cloud environment has been decommissioned.

Confirm Salesforce, Xledger, and invoicing are aligned.
