

Managely Essentials to Pro

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Purpose

Ensure all departments complete the required actions when a customer upgrades from Managely Essentials to Managely Pro, 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 the Managely billing platform.
5. Identify all active Managely Essentials SKUs.
6. End-date all applicable Managely Essentials SKUs effective the day prior to the approved Managely Pro start date.
7. Verify no Managely Essentials SKUs remain active after the end date.
8. Add all approved Managely Pro SKUs exactly as listed on the approved Opportunity or Quote.
9. Set the effective date for all Managely Pro 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 the Managely billing platform.

Module handling

1. Review the approved Managely Pro quote for SedonaX, eForms, and SalesAutomation.
2. If the quote includes SedonaX, eForms, or SalesAutomation, end-date the existing module SKUs effective the day prior to the migration date.
3. Add the new Managely Pro module SKUs effective the approved migration date.
4. Verify the module SKUs match the approved Opportunity or Quote.
5. Confirm there are no duplicate or overlapping module SKUs.

Invoice handling

1. Review whether an invoice has already generated for the Managely Essentials 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 Pro SKUs effective the migration date.
5. Validate the invoice before posting.
6. Confirm:
 - Correct billing dates
 - Correct subscription level
 - Correct billing amounts
 - No duplicate billing

Required internal notes

1. Add internal account notes documenting:
 - Date Managely Essentials SKUs were end-dated
 - Date Managely Pro SKUs were added
 - Module SKU updates, if applicable
 - Invoice action taken
 - Related Opportunity number
 - Related Quote number
 - Name of the person completing the updates

Operations

1. Update the contract in Salesforce to reflect the customer's Managely Pro subscription.
2. Update the software or edition designation in Salesforce from Managely Essentials to Managely Pro.
3. Confirm Salesforce reflects all licensed modules and the active subscription level.

Project Management Office

1. Verify the customer's Managely Pro environment has been provisioned.
2. Confirm all licensed Managely Pro functionality has been enabled.
3. If applicable, confirm SedonaX, eForms, and SalesAutomation have been enabled and are functioning correctly.
4. Confirm the customer has successfully transitioned to Managely Pro.

Completion checklist

1. Confirm Managely Essentials SKUs have been end-dated.
 2. Confirm Managely Pro SKUs have been added with the correct effective date.
 3. Confirm SedonaX, eForms, and SalesAutomation SKUs have been updated, if applicable.
 4. Confirm billing has been validated.
 5. Confirm invoice corrections have been completed, if applicable.
 6. Confirm Salesforce has been updated.
 7. Confirm all licensed modules have been provisioned and verified.
 8. Confirm Salesforce, the Managely billing platform, and invoicing are aligned.
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