Mangely Pro to Essentials

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Purpose

Ensure all departments complete the required actions when a customer downgrades from Managely Pro to Managely Essentials, 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 Pro SKUs.
6. End-date all applicable Managely Pro SKUs effective the day prior to the approved Managely Essentials start date.
7. Verify no Managely Pro SKUs remain active after the end date.
8. Add all approved Managely Essentials SKUs exactly as listed on the approved Opportunity or Quote.
9. Set the effective date for all Managely Essentials 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 Opportunity or Quote to determine whether SedonaX, eForms, or SalesAutomation will remain active after the downgrade.
2. End-date any module SKUs that are no longer included in the customer's Managely Essentials subscription effective the day prior to the migration date.
3. Add any replacement module SKUs listed on the approved Opportunity or Quote effective the approved migration date.
4. Verify there are no duplicate or overlapping module SKUs.

Invoice handling

1. Review whether an invoice has already generated for the Managely Pro 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 Essentials 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 Pro SKUs were end-dated
   - Date Managely Essentials 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 Essentials subscription.
2. Update the software or edition designation in Salesforce from Managely Pro to Managely Essentials.
3. Confirm Salesforce reflects all licensed modules and the active subscription level.

Project Management Office

1. Verify the customer's Managely Essentials environment and licensing have been provisioned correctly.
2. Remove access to Pro-only functionality that is no longer included in the customer's subscription.
3. If applicable, confirm retained SedonaX, eForms, and SalesAutomation modules are functioning correctly.
4. Confirm the customer has successfully transitioned to Managely Essentials.

Completion checklist

1. Confirm Managely Pro SKUs have been end-dated.
2. Confirm Managely Essentials 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 Pro-only functionality has been removed.
8. Confirm Salesforce, the Managely billing platform, and invoicing are aligned.