

# Generating and Verifying a Statement of Work (SOW)

This document provides instructions on how to create a Statement of Work (SOW) and how to verify the SOW.

## Navigate to the Quote queue

1. From the **Quote** queue, click the quote associate with the customer.

	Quote Number	Primary	Net Amount
1	Q-00015	<input checked="" type="checkbox"/>	\$122,420.00
2	Q-01059	<input checked="" type="checkbox"/>	\$1,500.00
3	Q-01076	<input checked="" type="checkbox"/>	\$26,800.00
4	Q-00018	<input type="checkbox"/>	\$3,280.45
5	Q-01069	<input checked="" type="checkbox"/>	\$93,770.00
6	Q-00882	<input checked="" type="checkbox"/>	\$4,900.00
7	Q-01007	<input checked="" type="checkbox"/>	\$3,465.00
8	Q-01049	<input checked="" type="checkbox"/>	\$49,900.00

2. Review all fields in the **Required Fields** section. **IMPORTANT!** All fields must be filled out.  
**NOTE:** To edit a field, click the pencil icon, type the information, and save.

Type	Quote
Status	Draft
Platform	Manitou
Quote Valid From	
Quote Valid To	1/18/2023
Reasons for Approvals	
Submitted User	Tk conway
QT Contract Term	2 Years

No past activity. Past meetings and tasks marked as done show up here.

**Required Fields**

**Account SOW Fields**

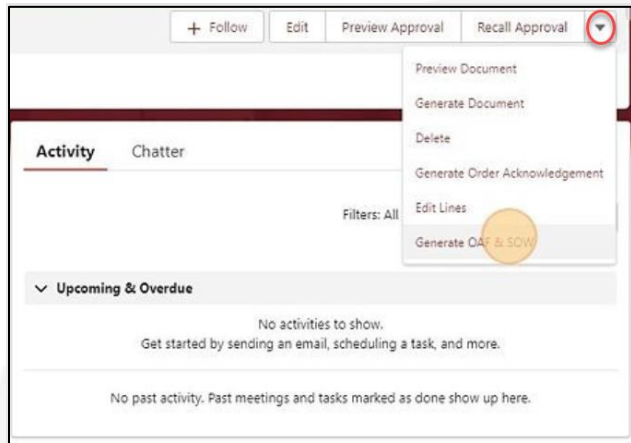
Account Name	Phone
Xenoge Technologies Test	111-111-1111
Primary Billing Email	Current Automation Software
Test.billing@test.com	Other

**Opportunity SOW Fields**

Opportunity Name	Account Name
Perennial SW-Xenoge Technologies	Xenoge Technologies Test

## Generate Order Acknowledgement Form (OAF) and Statement of Work (SOW)

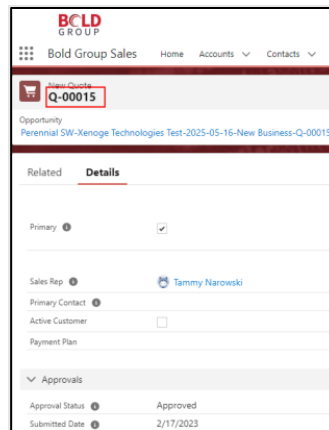
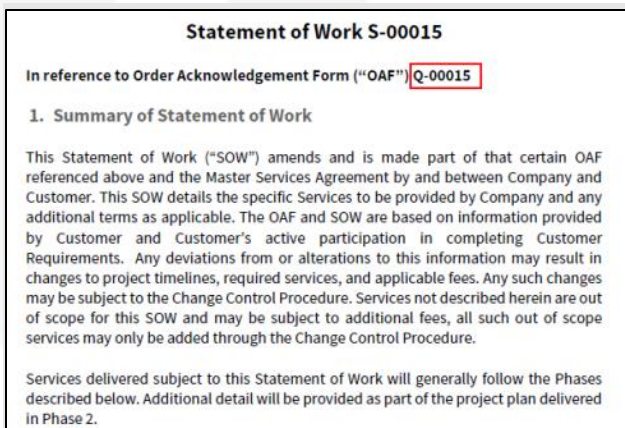
1. Click on the drop-down arrow and select **Generate OAF & SOW**.
2. Return to the Quote.



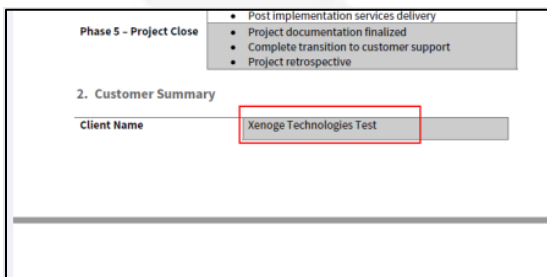
## Verify SOW

Verify the SOW to the information that is on the customer's account in Salesforce.

1. Verify the **SOW Quote Number**.



2. Verify **Client Name** compared to **Account Name**.



3. Verify Client Phone, Client Email, and Client Mailing Address compared to Phone, Primary Contact Email, and Bill To.

**Phase 5 - Project Close**

- customer support
- Post implementation services delivery
- Project documentation finalized
- Complete transition to customer support
- Project retrospective

**2. Customer Summary**

**Client Name** Xenoge Technologies Test

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**Client Phone** 111-111-1111

**Client Email** test.billing@test.com

**Client Mailing Address** 123 Main Street Anywhere Town, AnyState 00000

**Client Legacy System** Other

**Client Install Site Address** 123 Main Street Anywhere Town, AnyState 00000

**Client Desired Go Live Date** 02/24/2023

**Required Fields**

**Account SOW Fields**

Account Name Xenoge Technologies Test ✓ Phone 111-111-1111

Current Automation Software Other

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**Opportunity SOW Fields**

• khs0falkh

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**New Quote SOW Fields**

Account Name Xenoge Technologies Test Platform Manitou

Bold Contact Alison Forsythe ✓ Account Contact Test Test

Bold Contact Title President Account Contact Title

Bill To Street 123 Main Street ✓ Ship To Street 123 Main Street

Bill To City Anywhere Town ✓ Ship To City Anywhere Town

Bill To State AnyState ✓ Ship To State AnyState

Bill To Postal Code 00000 ✓ Ship To Postal Code 00000

Primary Contact Test Test

Primary Contact Email robertsculkin@gmail.com

4. Verify Client Legacy System compared to Current Automation Software.

**2. Customer Summary**

**Client Name** Xenoge Technologies Test

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**Client Phone** 111-111-1111

**Client Email** Test.billing@test.com

**Client Mailing Address** 123 Main Street Anywhere Town, AnyState 00000

**Client Legacy System** Other

**Client Install Site Address** 123 Main Street Anywhere Town, AnyState 00000

**Client Desired Go Live Date** 02/24/2023

**Required Fields**

**Account SOW Fields**

Account Name Xenoge Technologies Test ✓ Phone 111-111-1111

Current Automation Software Other

5. Verify Client Install Site Address compared to Ship To address.

**2. Customer Summary**

**Client Name** Xenoge Technologies Test

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**Client Phone** 111-111-1111  
**Client Email** Test.billing@test.com  
**Client Mailing Address** 123 Main Street Anywhere Town, AnyState 00000  
**Client Legacy System** Other  
**Client Install Site Address** 123 Main Street Anywhere Town, AnyState 00000  
**Client Desired Go Live Date** 02/24/2023

**New Quote SOW Fields**

**Account Name** Xenoge Technologies Test  
**Bold Contact** Alison Forsythe  
**Bill To Street** 123 Main Street  
**Bill To City** Anywhere Town  
**Bill To State** AnyState  
**Bill To Postal Code** 00000

**Platform** Manitou  
**Account Contact**  
**Account Contact Title**  
**Ship To Street** 123 Main Street  
**Ship To City** Anywhere Town  
**Ship To State** AnyState  
**Ship To Postal Code** 00000

6. Verify Client Desired Go Live Date compared to Expected Go Live.

**2. Customer Summary**

**Client Name** Xenoge Technologies Test

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**Client Phone** 111-111-1111  
**Client Email** Test.billing@test.com  
**Client Mailing Address** 123 Main Street Anywhere Town, AnyState 00000  
**Client Legacy System** Other  
**Client Install Site Address** 123 Main Street Anywhere Town, AnyState 00000  
**Client Desired Go Live Date** 02/24/2023

**Required Fields**

**Account SOW Fields**

**Account Name** Xenoge Technologies Test  
**Current Automation Software** Other  
**Phone** 111-111-1111

**Opportunity SOW Fields**

**Opportunity Name** Bold Tech-Xenoge Technologies Test-2023-03-09  
**Expected Go Live** 3/9/2023  
**Special Terms**  

- sdfkh
- hasdfjfh
- dasfsdfnih
- khsdfalkh

**Account Name** Xenoge Technologies Test  
**Close Date** 3/9/2023  
**Stage** Awaiting Discovery Call

7. Verify SOW Training and Services compared to Quote Lines.

**3. Professional Service Hours**

The following professional service hours by service type are included for the purposes of this SOW. If additional hours are necessary to provide the services for any reason, such changes will be subject to the Change Control Procedure. If the hours provided below are exhausted for any reason, Company will suspend services until a new OAF is executed to add additional hours.

#	QTY	Unit	Item	Description
1	2	Hour(s)	Set-up and Configure main Manitou DB/APP Server	Set-up and Configure main Manitou DB/APP Server
2	2	One Time Fee	Install Stealth Server	Additional Stealth server set-up and configuration. Includes necessary cabling/data taps between receiver(s) and server. Not to exceed 5 hours.
3	1	One Time Fee	Install Boldnet Server	Additional Boldnet server set-up and configuration. Includes necessary cabling/data taps between receiver(s) and server. Not to exceed 5 hours.
4	1	One Time Fee	Install MediaGateway Server	Additional MediaGatewayserver set-up and configuration. Includes necessary cabling/data taps between receiver(s) and server. Not to exceed 5 hours.
5	3	Hour(s)	Onsite Technical Services	Onsite Technical Services
6	1	Hour(s)	Data Conversion Analysis	Data Conversion Analysis: Bold will perform an extensive analysis of your current system data to determine a plan to electronically convert it to the Manitou system.

**Related Details**

**Orders (1)**

Order Number	Account Name	Status	Order Amount
0000100	Xenoge Technologies Test	Activated	\$122,420.00

**Quote Lines (6+)**

Line Name	Number	Product	Quantity
QL-0000913	1	Concurrent Full Users Mal...	7.00
QL-0000914	1	Concurrent Full Users Mal...	7.00
QL-0000915	2	Additional Accounts Main...	10,000.00
QL-0000916	2	Additional Accounts Main...	10,000.00
QL-0000917	3	PBX Standard Maintenanc...	1.00
QL-0000918	3	PBX Standard Maintenanc...	1.00

8. Verify SOW Special Terms compared to Special Terms.

**8. Special Terms**

Special terms

1. Term 1

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2. Term 2

- Option 1
- option 2

This is bold

**Required Fields**

**Account SOW Fields**

Account Name Xenoge Technologies Test	Phone 111-111-1111
Current Automation Software Other	

**Opportunity SOW Fields**

Opportunity Name Bold Tech-Xenoge Technologies Test-2023-03-09	Account Name Xenoge Technologies Test
Expected Go Live 3/9/2023	Close Date 3/9/2023
<b>Special Terms</b> <ul style="list-style-type: none"><li>• sdfkh</li><li>• hasdfjfh</li><li>• dasfsdfhjh</li><li>• khdsdfalkh</li></ul>	Stage Awaiting Discovery Call

9. Verify SOW Requirements.

**Exhibit A - Requirements**

Set-up and Configure main Manitou DB/APP Server

**1. Customer Requirements.**  
Customer is responsible for the following Customer requirements:

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**2. Company Requirements**  
Company is responsible for the following Company requirements:

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**3. Additional Notes and Requirements**

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To view a video of this process, [click here](#).