

Non Auto Renewal Field

05/30/2024 4:33 pm EDT

Follow this process to select contracts to not auto-renew.

- 1. Navigate to desired quote
- 2. Scroll down to the Information section, click **Edit Non Auto Renewal**



- 3. Click the **Non Auto Renewal** box; click **Save** and close the opportunity.

The screenshot shows a form with the following fields:

- Primary Contact**: Includes an information icon and a search bar labeled "Search Contacts..." with a magnifying glass icon.
- RMR**: Displays "\$112.35" with a note "This field is calculated upon save".
- Active Customer**: Includes a checkbox and a note "This field is calculated upon save".
- Payment Plan**: A dropdown menu showing "100".
- Billing Frequency**: A dropdown menu showing "Monthly".
- Scoping Book URL**: An empty text input field with an information icon.
- Non Auto Renewal**: A checkbox that is highlighted with an orange circle, indicating it should be selected.

- 4. Six months before the contract end date:
 - a. A task will be created for the opportunity owner
 - b. An email will be send to Bold Sales

