

Pye Barker Acquisition Process

This document outlines the internal process for managing acquisitions by Pye Barker, from the point of notification to Bold Group through to billing changes and account updates. It provides step-by-step guidance for sales representatives and accounts receivable (AR) teams to ensure seamless integration of acquired companies and proper billing alignment with Pye Barker's parent account. This process ensures accurate financial management and maintains consistency across all acquisitions.

Internal Process for Handling Pye Barker Acquisitions

1. **Notification of Acquisition**
Pye Barker notifies Bold Group of the acquisition.
2. **Update Master Acquisition List**
The sales representative adds the acquired company to the master spreadsheet titled [Pye Barker Acquisition List](#)
3. **Parent Account Addition**
The sales representative links the acquired company to Pye Barker's parent account in the Account Page.
4. **Billing Redirection Request**
The sales representative submits a support ticket to redirect the billing of the acquired company to the Pye Barker parent account.
 - o **Training for Steps 1-4:** Refer to the [Pye Barker Acquisition - Routing Billing to PB for Acquired Company](#) process video for detailed training.
5. **AR Billing Process**
Once the ticket is submitted, the Accounts Receivable (AR) team processes the request:
 - a. Redirects billing to Pye Barker's Accounts Payable team and cc's Kevin Alison.
 - o **Primary Contact:** ap@mountainalarm.com
 - o **CC Contact:** Kevin Wilde - kwilde@mountainalarm.com
 - b. Turns off autopay for the acquired company's account, if applicable.
6. **Transfer Fee Amendment**
The sales representative creates an amendment for the Pye Barker parent account, which includes a quote for the transfer fee, following the [Pye Barker - Transfer Fee Quoting Process](#) training video or [How to Quote a Transfer Fee](#) document.
7. **Ongoing Account Review**
The sales representative reviews the [Pye Barker Acquisition List](#) weekly during 1:1 meetings and updates relevant fields to ensure all acquisitions are processed correctly.
8. **Billing Cancellation Notification**
Pye Barker provides written notice to Bold Group on the date when billing for the acquired account should be reduced or canceled.
9. **Cancellation Case Submission**
The sales representative submits a cancellation case for the acquired company's account as per Pye Barker's instructions.

Quoting Additional On-Prem Subscription Users for Pye Barker

1. Navigate to the [Pye Barker](#) Account

The screenshot shows the 'Pye Barker' account page in the Bold Group Sales CRM. The page layout includes a top navigation bar with 'Bold Group Sales' and various menu items like Home, Accounts, Leads, Contacts, Opportunities, New Quotes, Tasks, Dashboards, Reports, Calendar, Notes, Products, and More. The main content area is divided into several sections: a left sidebar with account details (Phone: (801) 399-1333, Website: www.mountainalarm.com, Account Owner: Ops Evercommerce), a central 'Related List Quick Links' section with links to Contacts (10+), Partners (0), Collections and Cancellations (1), Modules (10+), Opportunities (10+), Cases (10+), and Contracts (2), and a right sidebar with contact information for Aaron Allen, Abigail Leroh, and Alpha Nelson. The bottom section shows account details like Parent Account (Mountain Alarm), Account Alternative Name, Shipping Address (Po Box 12487, Ogden, UT 84412, United States), and a map of Ogden, Utah.

2. Create an amendment quote for Pye Barker contract

The screenshot shows the 'Contracts' section for the 'Pye Barker' account. The 'Contracts' tab is selected, and the 'Amend' button is highlighted. The page displays contract details for contract 00001532, including Account Name (Pye Barker), Status (Activated), Contract Start Date (10/18/2023), Contract End Date (10/17/2026), and Contract Term (months) (36). Below the contract details, there is a table of 'Subscriptions (10+)' with columns for Subscript..., Product, Start Date, End Date, Renewed..., Terminate..., Regular Price, Created Date, and Created By. The table lists several subscriptions for 'SedonaOffice On-Prem Subscription' with varying start and end dates and prices.

3. Select Add Products

The screenshot shows the 'Edit Quote' page for quote Q-01236. The 'Add Products' button is highlighted. The page includes a top navigation bar with 'Bold Group Sales' and various menu items. The main content area shows the 'Edit Quote' page with a search bar and buttons for 'Add Products', 'Add Group', 'Delete Lines', 'Quick Save', 'Calculate', 'Cancel', and 'Save'. Below the buttons, there is a table for 'Segmented Products' with columns for YEAR, PRODUCT CODE, PRODUCT NAME, YEAR 1, YEAR 2, YEAR 3, YEAR 4, YEAR 5, and TOTAL.

4. Search and select sku "SedonaOffice On-Prem Subscription"

The screenshot shows the 'Product Selection' page for quote Q-01236. The 'SedonaOffice On-Prem Subscription' product is selected. The page includes a top navigation bar with 'Bold Group Sales' and various menu items. The main content area shows the 'Product Selection' page with a search bar and buttons for 'Select & Add More' and 'Cancel'. Below the buttons, there is a table for 'Product Selection' with columns for PRODUCT CODE, PRODUCT NAME, PRODUCT FAMILY, PRODUCT DESCRIPTION, and LIST PRICE. The table lists the 'SedonaOffice On-Prem Subscription' product with a list price of \$85.00.

5. Select the drop down arrow and enter in the quantity (# of users) for each applicable year and select save

YEAR	PRODUCT CODE	PRODUCT NAME	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5	TOTAL
1	HST-SCS-USER	SedonaOffice On-Demand Subscription	\$1,020.00	\$1,020.00	\$1,020.00	\$1,020.00	\$1,020.00	\$5,100.00
		QUANTITY	50.00	50.00	50.00	50.00	50.00	
		LIST UNIT PRICE	\$85.00	\$85.00	\$85.00	\$85.00	\$85.00	
		UPLIFT	0.00%	0.00%	0.00%	0.00%	0.00%	
		ADDITIONAL DISC.						
		NET UNIT PRICE	\$1,020.00	\$1,020.00	\$1,020.00	\$1,020.00	\$1,020.00	
		NET TOTAL	\$1,020.00	\$1,020.00	\$1,020.00	\$1,020.00	\$1,020.00	

6. Enter required fields and submit for approval

Quote quick checklist of fields to enter:

- Accounts Payable Contact : Primary AP contact for account (can be located in SFDC and internal billing system)
- Primary Contact: Primary contact for the contract
- Notes: Quick description of what is being sold
- Platform: Perennial
- Payment Term: Should match MSA
- Billing Frequency: Monthly
- Recurring Fee Start Date: License Recurring

7. Once approved route agreement via SFDC using the DocuSign integration via the [DocuSign Steps](#)