Quote Renewal Process

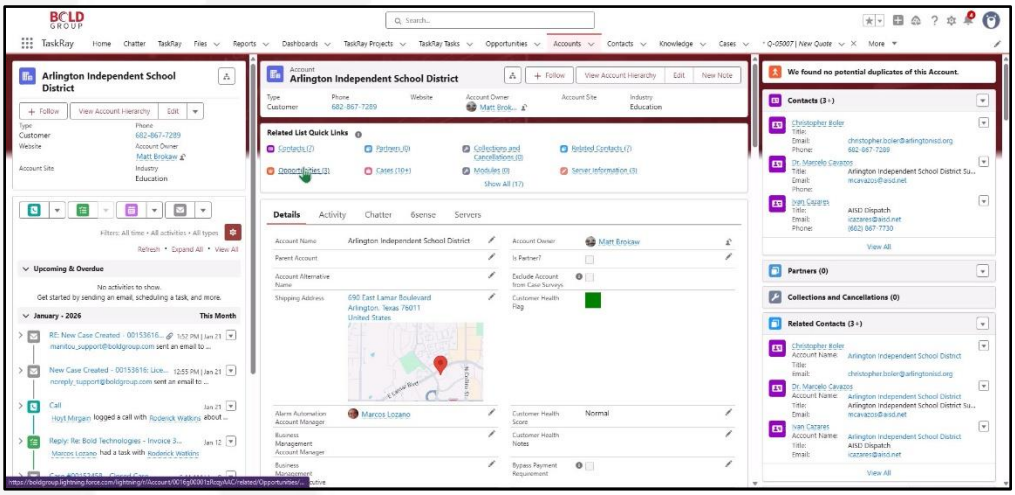
When a quote renewal request is received, confirm with the customer if they need a quote from our team or if an invoice will suffice for their needs. Either way, a case will need to be created in SalesForce. Our naming convention for these cases will be Manitou Renewal Request 20XX (XX being the current year), so that we can easily search for these cases.

If the customer just needs an invoice, then tag the appropriate billing representative and request an invoice for the upcoming renewal period. Once the invoice is received, the customer can be sent the invoice from the case with the invoice attached. Once that is done, the case can be closed out.

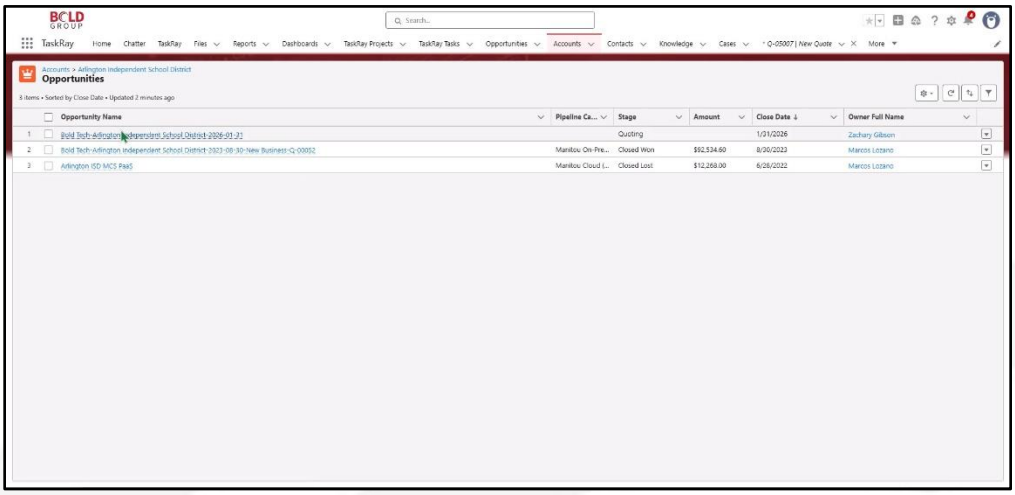
If the customer requires a quote, follow the steps to create the requested quote.

1. Request from billing, via Post in the case, the amount of the price increase for the upcoming renewal period (usually 3%).

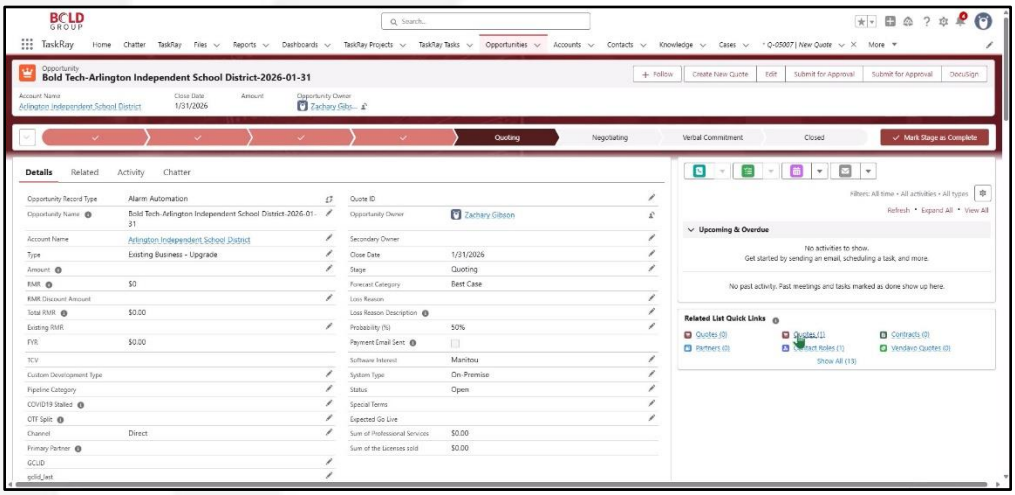
2. From within the customer, locate the **Opportunities** field under **Related List Quick Links**.

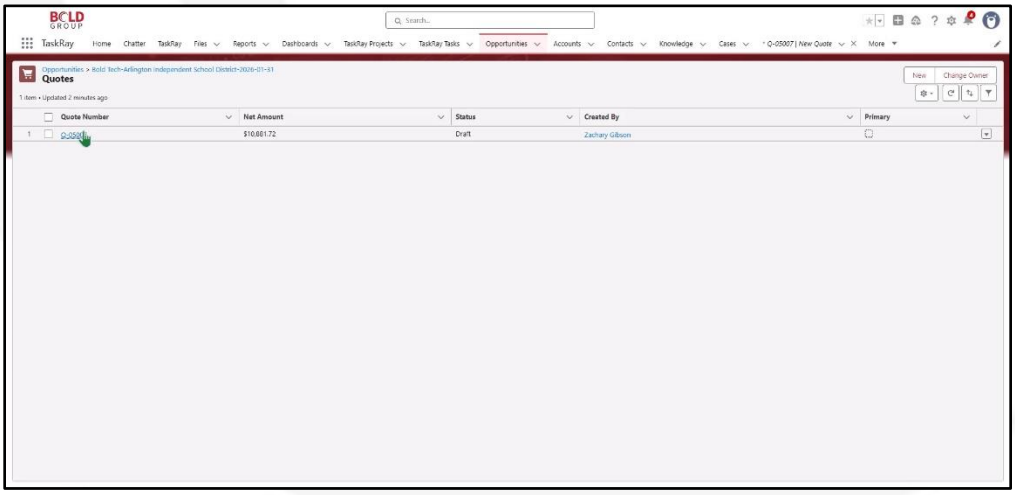


3. Locate the $0 opportunity (usually under Zach's name if it has been created previously) and click on it. **The quote will need to be transferred to the CSM handling the renewal.** If there is no $0 opportunity in the account, contact someone from Alarm Monitoring sales for a walkthrough of creating a new quote.

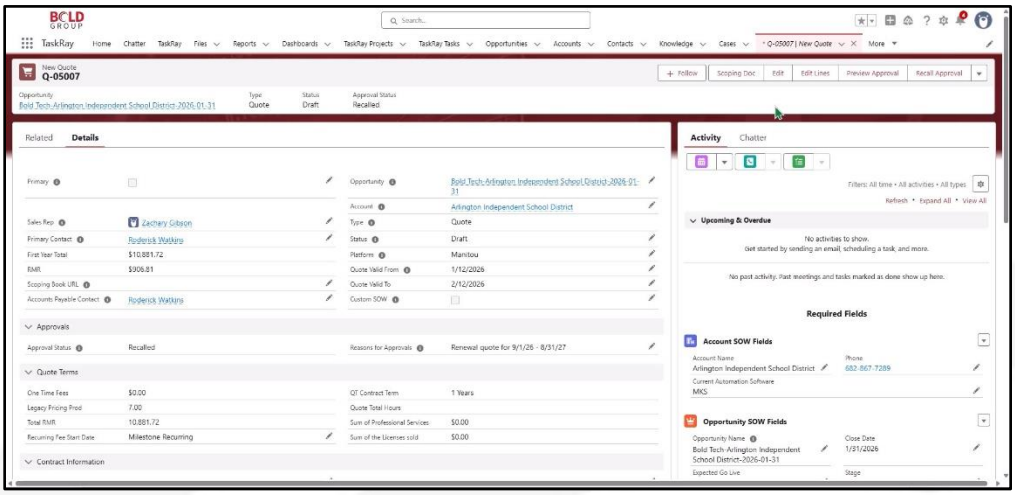


4. Click on the quotes from the **Related List Quick Links**.





5. If the quote is “Approved”, click on **Recall Approval** so that the quote can be edited.



6. Update the following items within the quote:

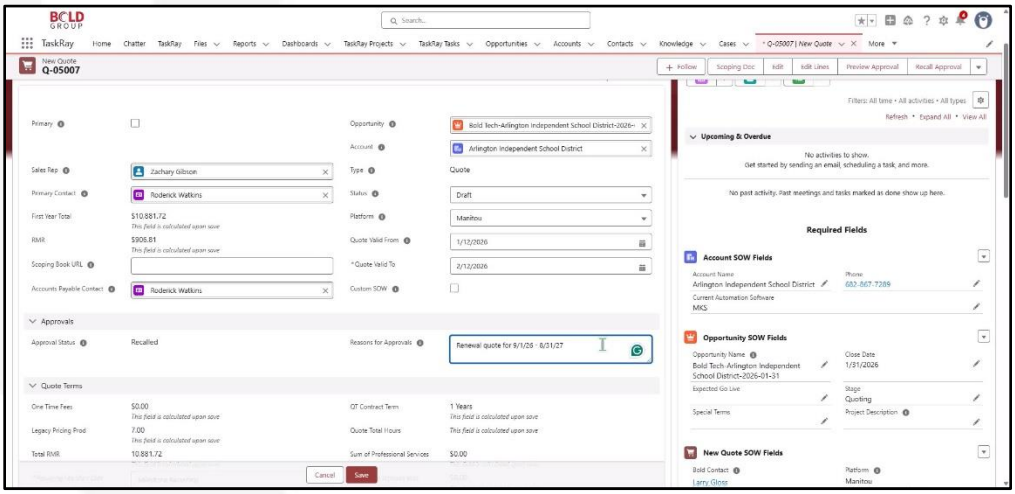
    a. **Sales Rep** – change to CSM handling quote (click on the X to be able to change the name).

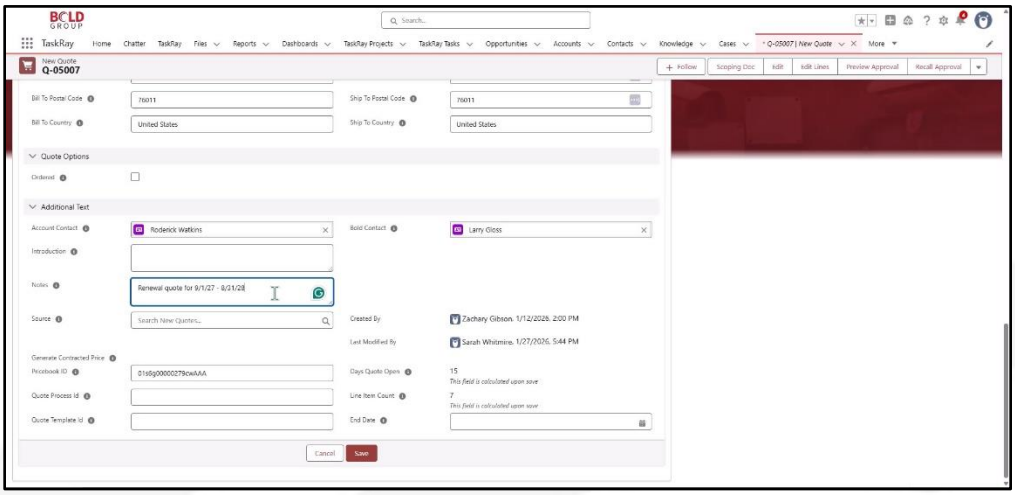
    b. **Quote Valid From** – change to current date.

    c. **Quote Valid To** – set to 30 days from current date.

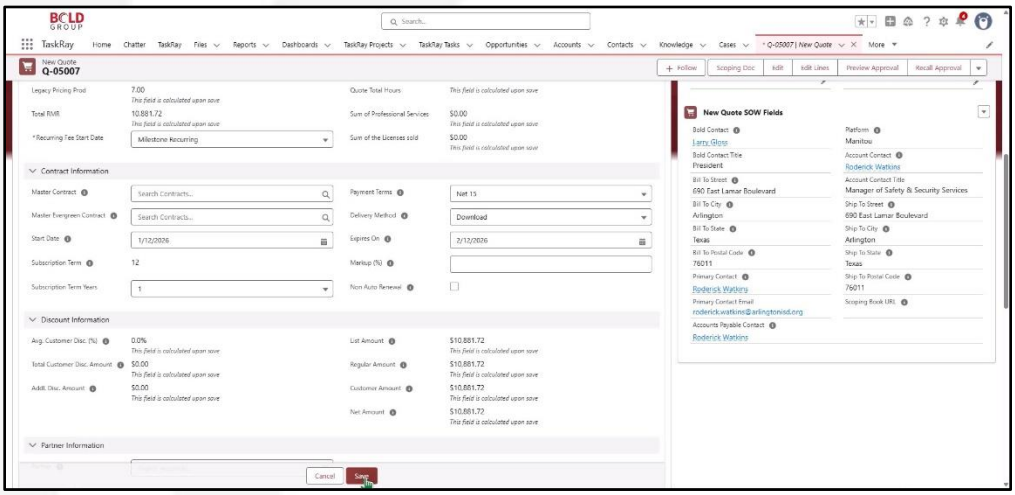
    d. **Reason for Approval** field with the adjusted date range (for the upcoming year renewal). Scroll down to Notes field to capture date range and adjust for upcoming year).

    e. **Notes** field with the adjusted date range (for the upcoming year renewal).

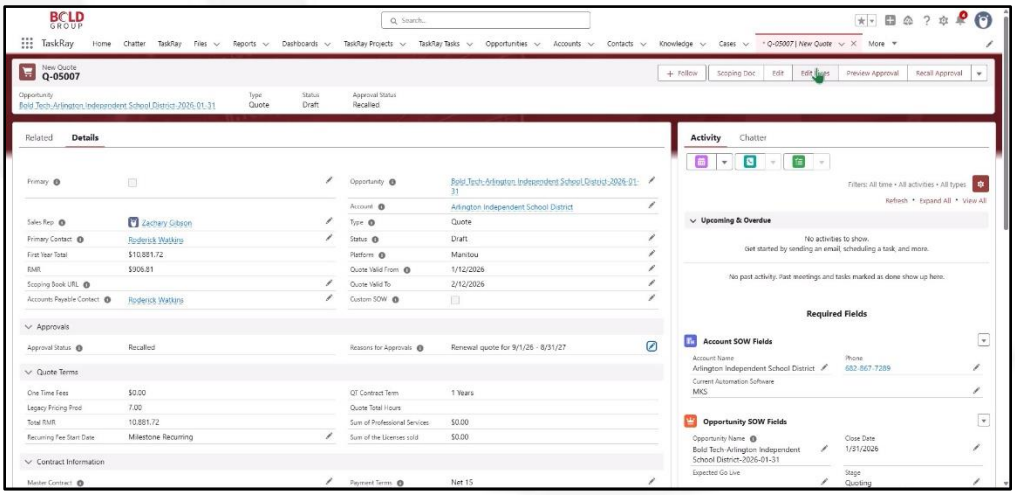




7. Once that is completed, click on **Save**.

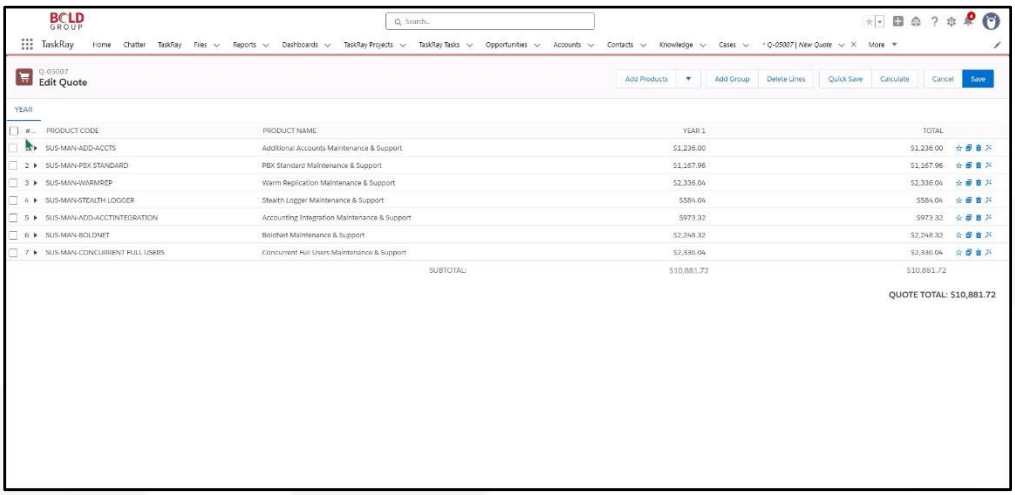


8. Next, click on **Edit Lines** to enter the updated pricing on the Line Items for the invoice.

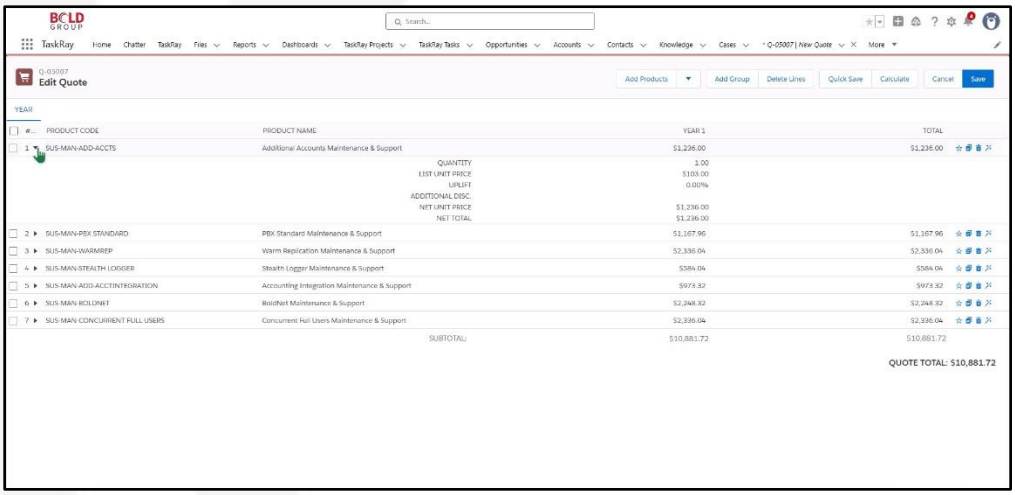


9. Recommendation to calculate the new total (to verify that all lines have been properly updated) before updating the pricing on each line item by multiplying the total X 1.03 (or whatever the increase

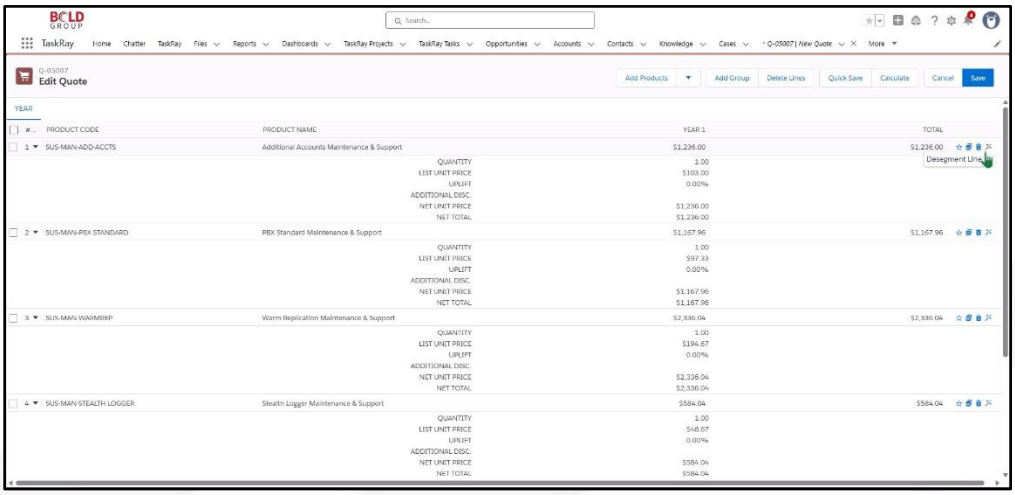
percentage is).

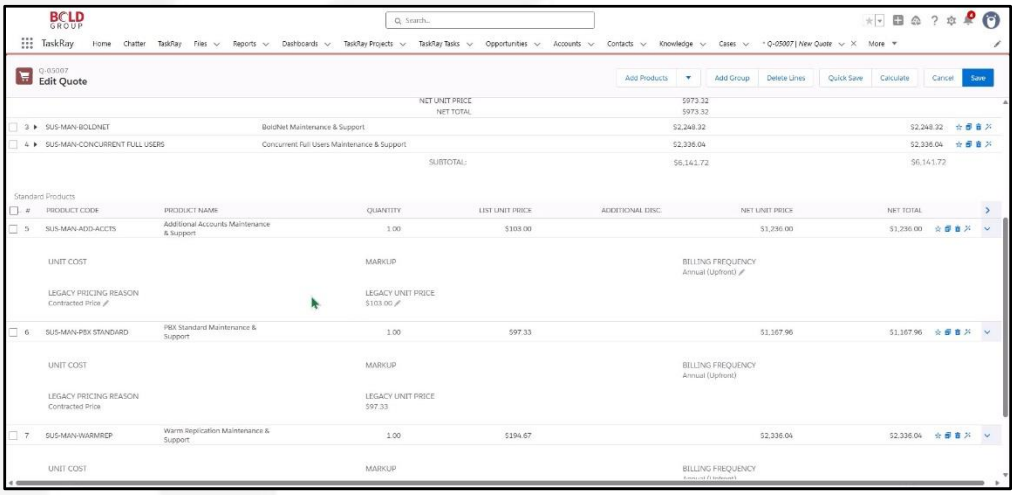


10. Expand each Line Item by clicking on the triangle next to the Line Item number.

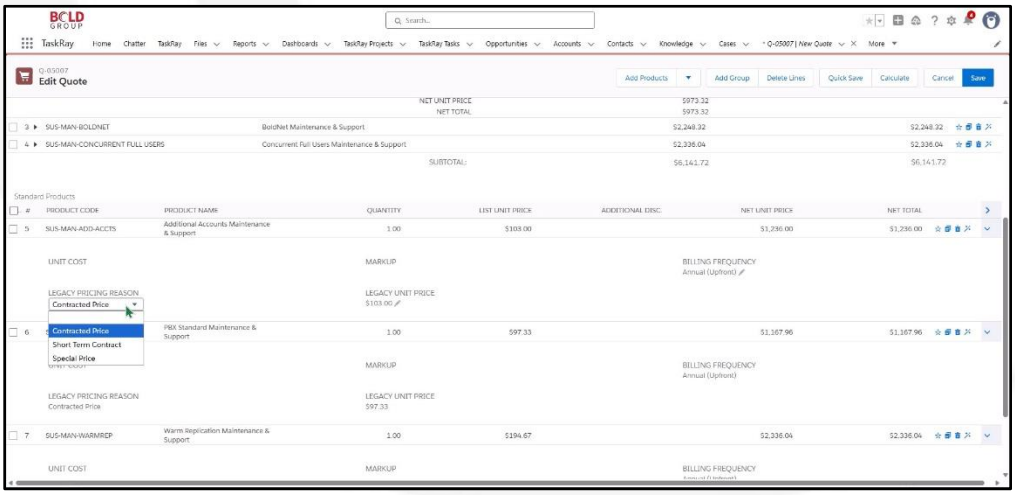


11. Then, on each line, click on Desegment (on the right side of the line) so the appropriate pricing updates can be done. (Desegment will unlock the price field to make it editable; Resegment will lock the price field).

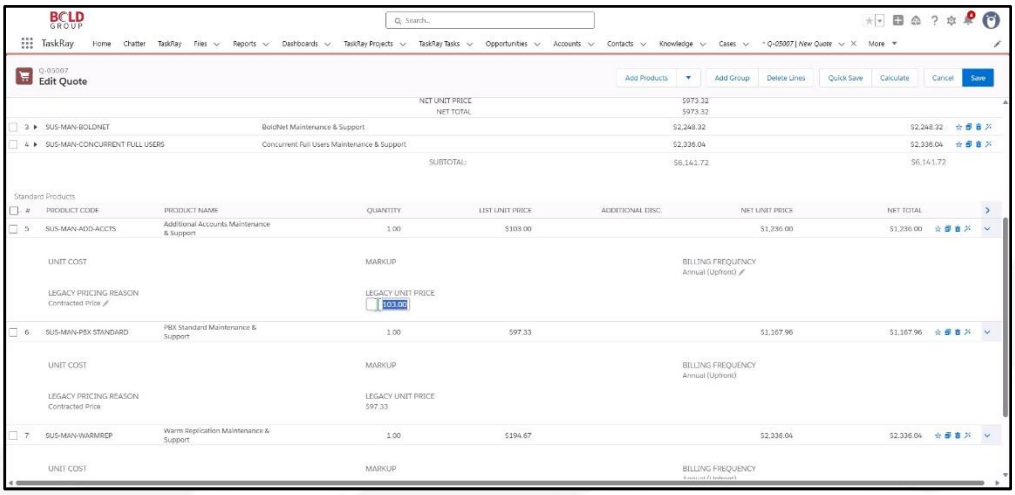




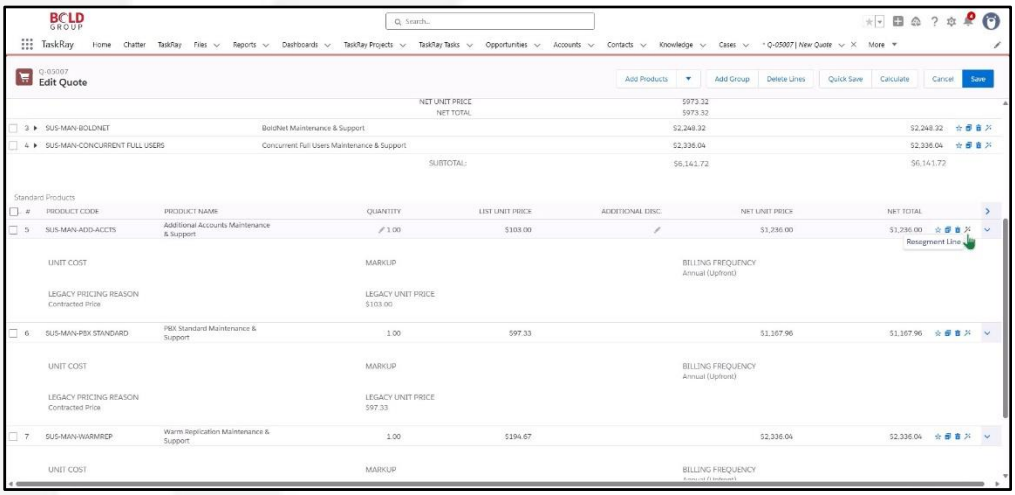
12. Confirm the **Legacy Pricing Reason** is set to **Contract Price** (it will usually already be set this if it's an existing quote, but if a new line item needs to be added).



13. Update the **Legacy Unit Price** with the appropriate pricing increase.

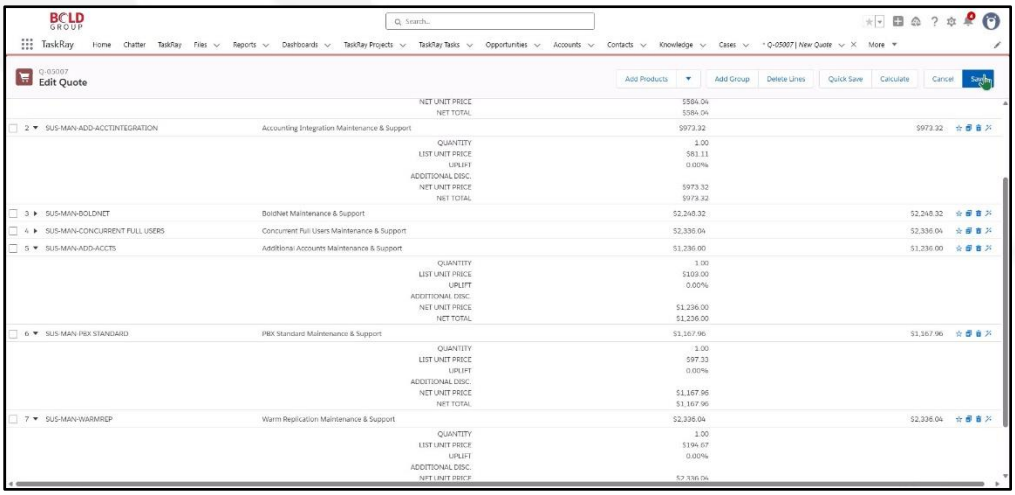


14. Click on **Resegment** on each line after entering the pricing increase to lock in the entry.

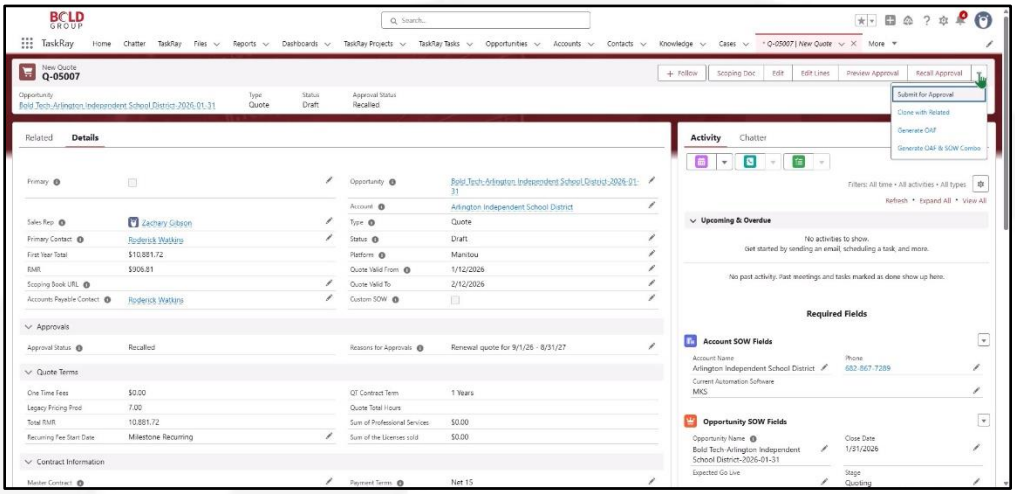


15. Confirm the updated total matches what was calculated above for the new total.

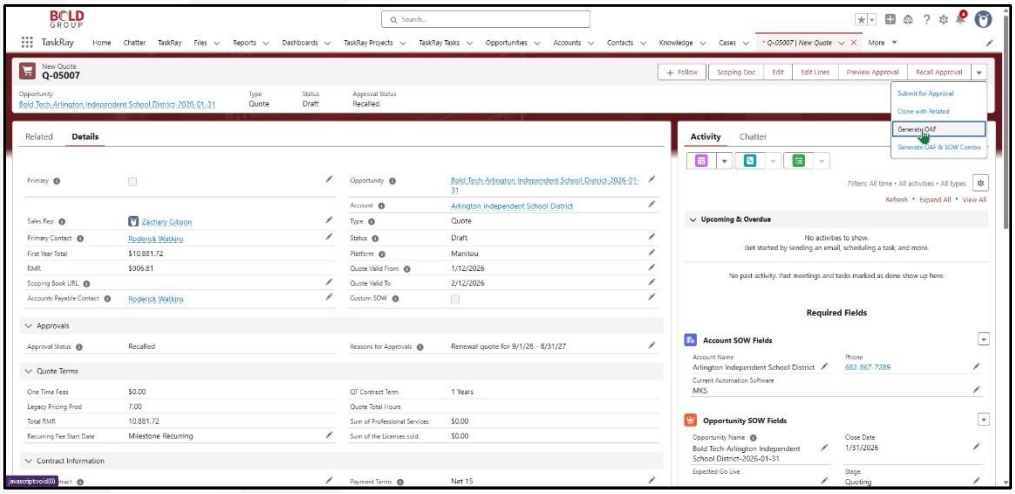
16. If all is correct, click on **Save.** If the total does not match, you will need to check and make sure all line items were adjusted correctly.



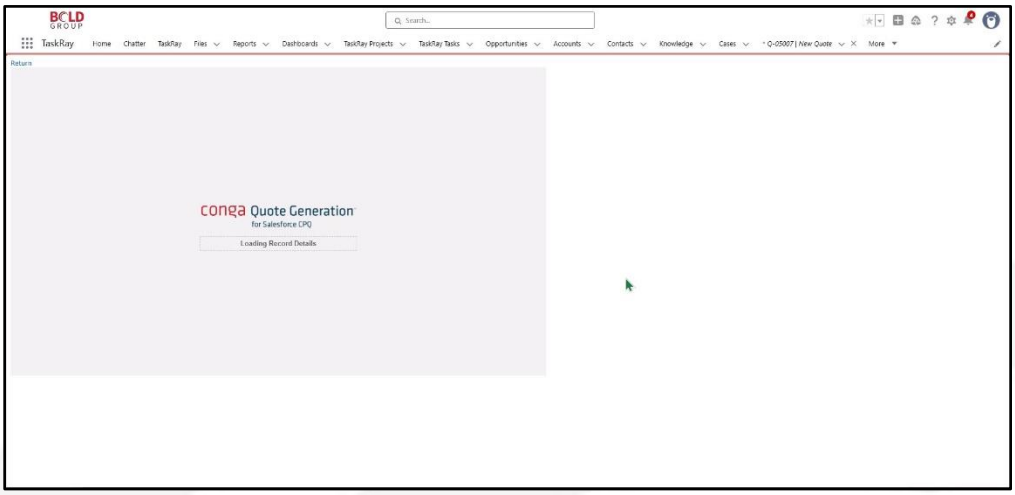
17. At this point, click on **Submit for Approval**, where it will go to Justin, then Tammy or Amy for review and approval. **Set a reminder to check on the approval within 48 hours of submitting it (the notification does not always come through).**

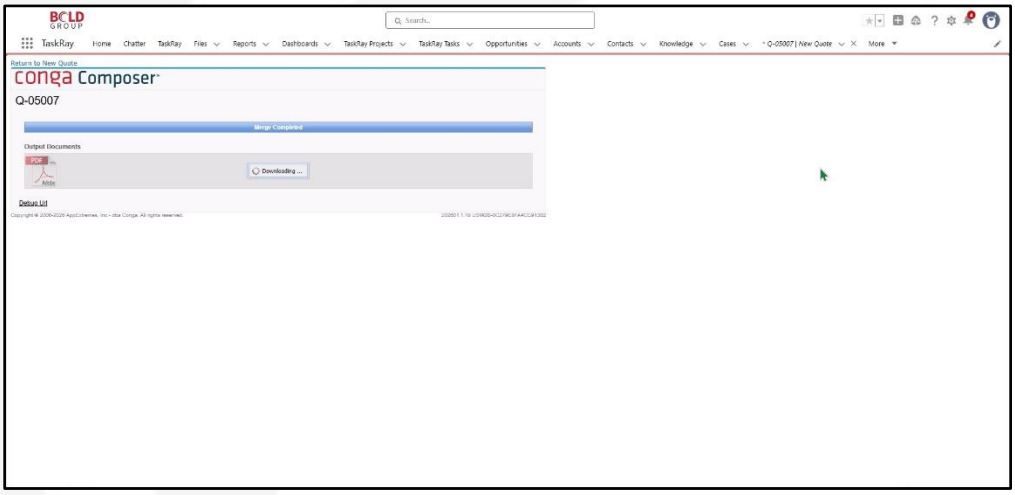


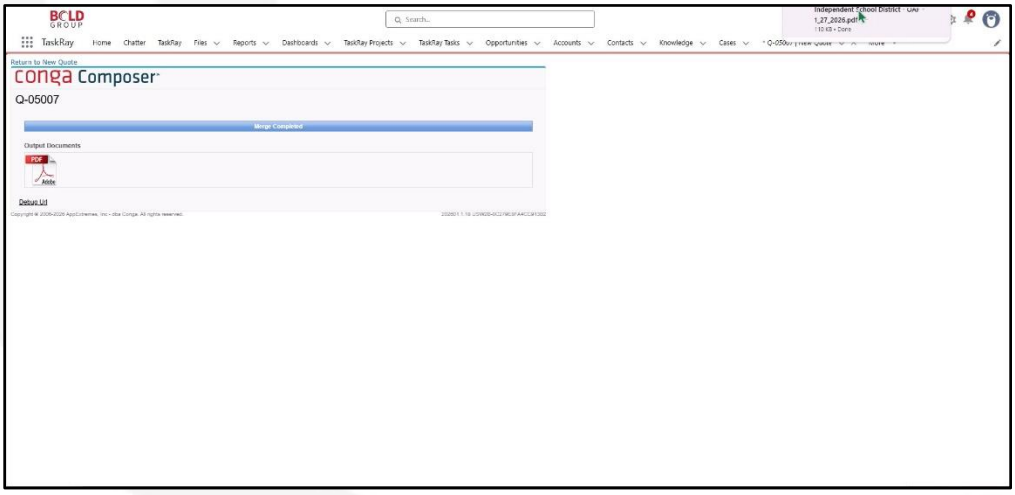
18. Once the quote has come back as approved, click on **Generate OAF**.



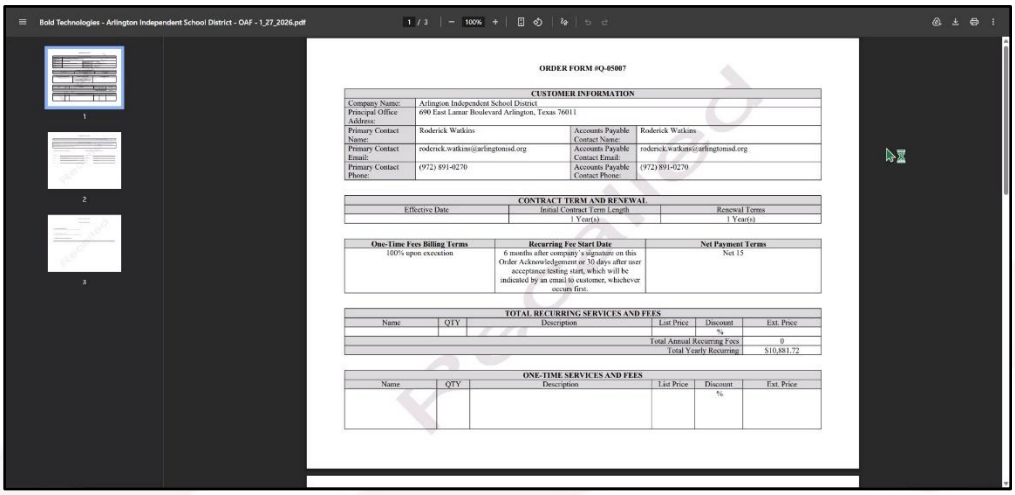
19. The OAF will download once it has been generated by the system.







20. Review the document to make sure that all of the correct information is on there (including the special notes for the renewal term).



Bold Technologies - Arlington Independent School District - OAF - 1_27_2026.pdf

ORDER FORM #Q-05007

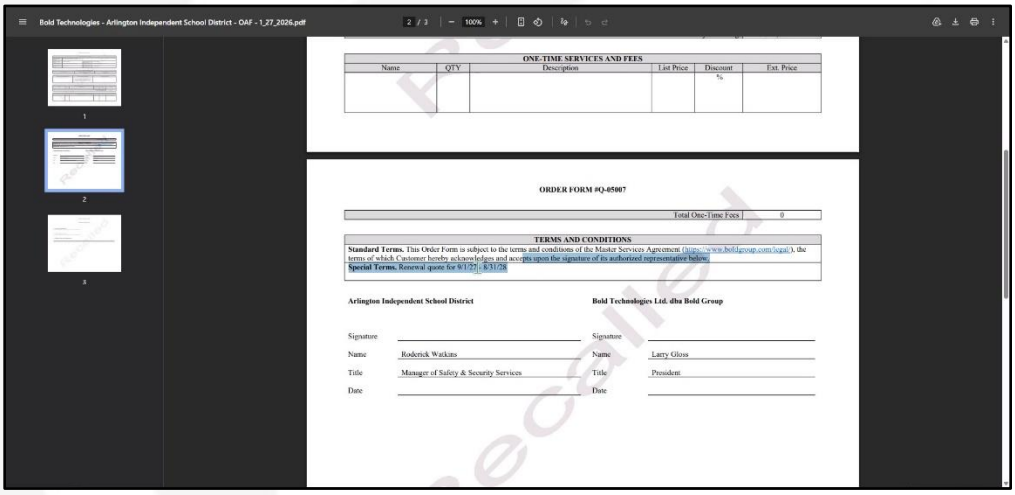
CUSTOMER INFORMATION			
Company Name:	Arlington Independent School District		
Principal Office Address:	690 East Lamar Boulevard Arlington, Texas 76011		
Primary Contact Name:	Roderick Watkins	Accounts Payable Contact Name:	Roderick Watkins
Primary Contact Email:	roderick.watkins@arlingtonisd.org	Accounts Payable Contact Email:	roderick.watkins@arlingtonisd.org
Primary Contact Phone:	(972) 891-0270	Accounts Payable Contact Phone:	(972) 891-0270

CONTRACT TERM AND RENEWAL		
Effective Date	Initial Contract Term Length	Renewal Terms
	1 Year(s)	1 Year(s)

One-Time Fees Billing Terms	Recurring Fee Start Date	Net Payment Terms
100% upon execution	6 months after company's signature on this Order Acknowledgment or 30 days after user acceptance testing start, which will be indicated by an email to customer, whichever occurs first.	Net 15

TOTAL RECURRING SERVICES AND FEES					
Name	QTY	Description	List Price	Discount	Ext. Price
				%	
				Total Annual Recurring Fees	0
				Total Yearly Recurring	$10,881.72

ONE-TIME SERVICES AND FEES					
Name	QTY	Description	List Price	Discount	Ext. Price
				%	



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ONE-TIME SERVICES AND FEES					
Name	QTY	Description	List Price	Discount	Ext. Price
				%	

ORDER FORM #Q-05007

Total One-Time Fees	0

TERMS AND CONDITIONS
Standard Terms. This Order Form is subject to the terms and conditions of the Master Services Agreement (https://www.boldgroup.com/legal/), the terms of which Customer hereby acknowledges and accepts upon the signature of its authorized representative below.
Special Terms. Renewal quote for 8/1/27 - 8/31/28

Arlington Independent School District		Bold Technologies Ltd. dba Bold Group	
Signature		Signature	
Name	Roderick Watkins	Name	Larry Gloss
Title	Manager of Safety & Security Services	Title	President
Date		Date	

21. If that is all correct, then use the Renewal Email Template to send it to the customer.
22. Close the case.