

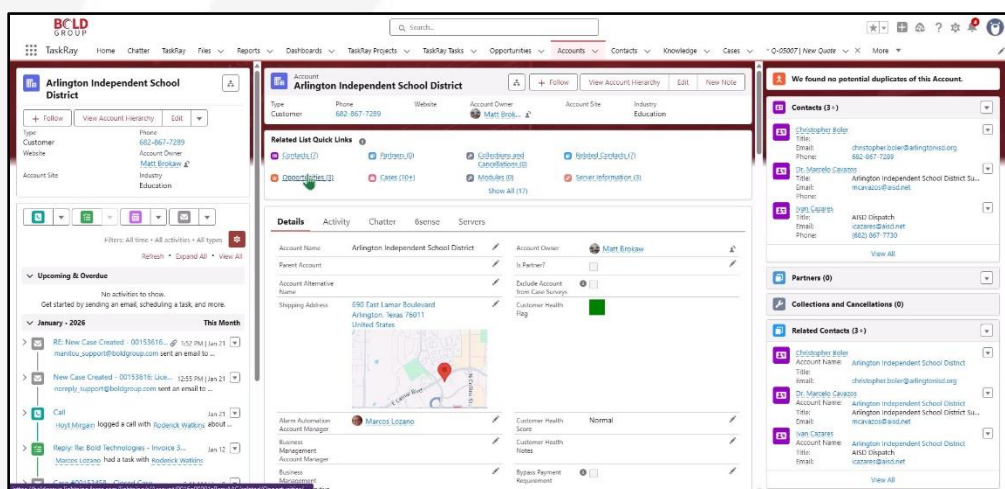
Quote Renewal Process

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.

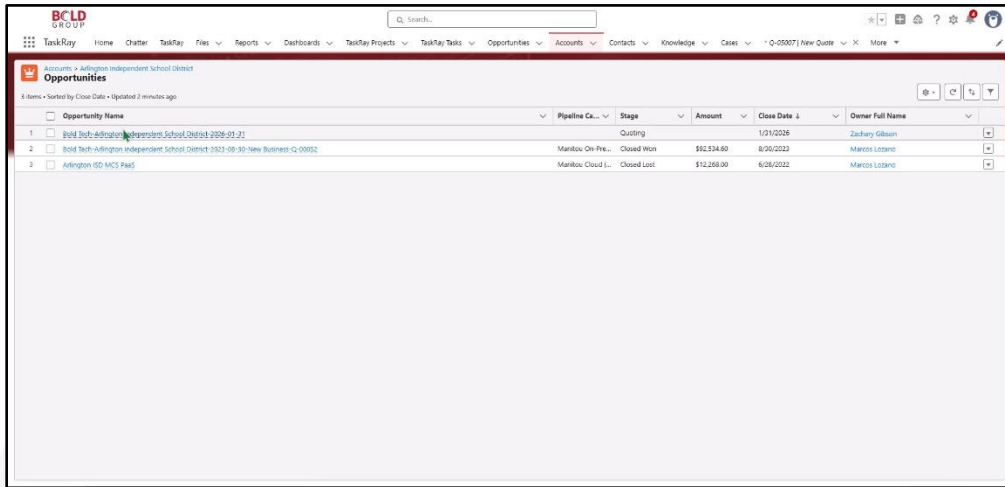
If the customer just needs an invoice, then tag the appropriate billing representative and request an invoice for the upcoming renewal period. Once the invoice is received, the customer can be sent the invoice from the case with the invoice attached. Once that is done, the case can be closed out.

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

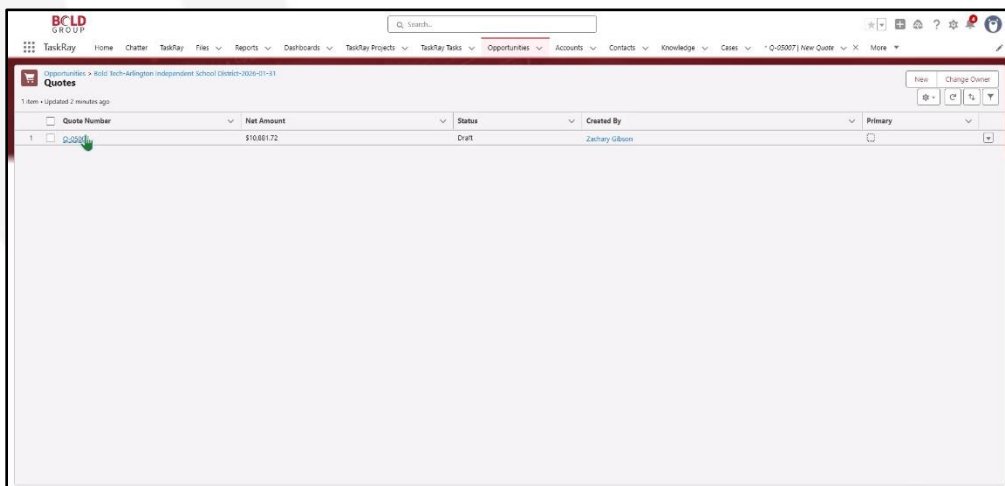
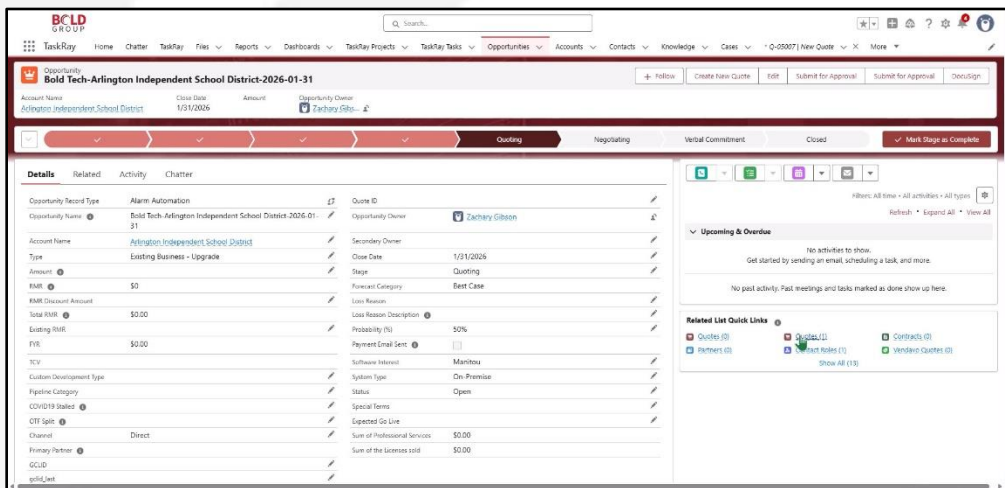
1. Request from billing, via Post in the case, the amount of the price increase for the upcoming renewal period (usually 3%).
2. From within the customer, locate the **Opportunities** field under **Related List Quick Links**.



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.

BOLD GROUP

TaskRay Home Chatter TaskRay Files Reports Dashboards TaskRay Projects TaskRay Tasks Opportunities Accounts Contacts Knowledge Cases Q-05007 | New Quote X More

New Quote Q-05007 Follow Scoping Doc Edit Edit Lines Preview Approval Recall Approval

Opportunity: Bold Tech-Arlington Independent School District-2026-01-31 Type: Quote Status: Draft Approval Status: Recalled

Related Details

Primary: ☐ Opportunity: Bold Tech-Arlington Independent School District-2026-01-31 Account: Arlington Independent School District Type: Quote Status: Draft Quote Valid From: 1/12/2026 Quote Valid To: 2/12/2026 Custom SOW: ☐

Sales Rep: Zachary Gibson Primary Contact: Roderick Watkins First Year Total: \$10,881.72 RMT: \$906.81 Scoping Book URL: Accounts Payable Contact: Roderick Watkins

Approvals

Approval Status: Recalled Reasons for Approvals: Renewal quote for 8/1/25 - 8/31/27

Quote Terms

One Time Fee: \$0.00 QT Contract Term: 1 Years Legacy Pricing Prod: 7.00 Quote Total Hours: Sum of Professional Services: \$0.00 Total RMT: 10,881.72 Sum of the Licenses sold: \$0.00 Recurring Fee Start Date: Milestone Recurring

Contract Information

Activity Chatter

Filters: All time All activities All types Refresh Expand All View All

Upcoming & Overdue

No activities to show. Get started by sending an email, scheduling a task, and more.

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

Required Fields

Account SOW Fields

Account Name: Arlington Independent School District Phone: 682-567-7289 Current Automation Software: MKS

Opportunity SOW Fields

Opportunity Name: Bold Tech-Arlington Independent School District-2026-01-31 Close Date: 1/31/2026 Supervisor On Line: Stage:

6. Update the following items within the quote:

- Sales Rep** – change to CSM handling quote (click on the X to be able to change the name).
- Quote Valid From** – change to current date.
- Quote Valid To** – set to 30 days from current date.
- 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).
- Notes** field with the adjusted date range (for the upcoming year renewal).

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TaskRay Home Chatter TaskRay Files Reports Dashboards TaskRay Projects TaskRay Tasks Opportunities Accounts Contacts Knowledge Cases Q-05007 | New Quote X More

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Opportunity: Bold Tech-Arlington Independent School District-2026-01-31 Account: Arlington Independent School District Type: Quote Status: Draft Quote Valid From: 1/12/2026 Quote Valid To: 2/12/2026 Custom SOW: ☐

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Opportunity SOW Fields

Opportunity Name: Bold Tech-Arlington Independent School District-2026-01-31 Close Date: 1/31/2026 Supervisor On Line: Stage:

New Quote SOW Fields

Bold Contact: Zachary Gibson Platform: Monitor

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).

YEAR	PRODUCT CODE	PRODUCT NAME	YGRP 1	TOTAL
1	SUS-MAN-ADD-ACCTS	Additional Accounts Maintenance & Support	\$1,236.00	\$1,236.00
2	SUS-MAN-PSIX STANDARD	PBIX Standard Maintenance & Support	\$1,167.96	\$1,167.96
3	SUS-MAN-WARMREP	Warm Replication Maintenance & Support	\$2,336.04	\$2,336.04
4	SUS-MAN-STEALTH LOGGER	Stealth Logger Maintenance & Support	\$584.04	\$584.04
5	SUS-MAN-ADD-ACCTINTEGRATION	Accounting Integration Maintenance & Support	\$973.32	\$973.32
6	SUS-MAN-BCOLNET	Bechthel Maintenance & Support	\$2,248.32	\$2,248.32
7	SUS-MAN-CONCURRENT FULL USERS	Concurrent Full Users Maintenance & Support	\$2,836.04	\$2,836.04
SUBTOTAL			\$10,881.72	\$10,881.72
				QUOTE TOTAL: \$10,881.72

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

YEAR	PRODUCT CODE	PRODUCT NAME	YGRP 1	TOTAL
1	SUS-MAN-ADD-ACCTS	Additional Accounts Maintenance & Support	\$1,236.00	\$1,236.00
				QUANTITY: 1.00
				LIST UNIT PRICE: \$1236.00
				UPLIFT: 0.00%
				ADDITIONAL DISC: \$1,236.00
				NET UNIT PRICE: \$1,236.00
				NET TOTAL: \$1,236.00
2	SUS-MAN-PSIX STANDARD	PBIX Standard Maintenance & Support	\$1,167.96	\$1,167.96
3	SUS-MAN-WARMREP	Warm Replication Maintenance & Support	\$2,336.04	\$2,336.04
4	SUS-MAN-STEALTH LOGGER	Stealth Logger Maintenance & Support	\$584.04	\$584.04
5	SUS-MAN-ADD-ACCTINTEGRATION	Accounting Integration Maintenance & Support	\$973.32	\$973.32
6	SUS-MAN-BCOLNET	Bechthel Maintenance & Support	\$2,248.32	\$2,248.32
7	SUS-MAN-CONCURRENT FULL USERS	Concurrent Full Users Maintenance & Support	\$2,836.04	\$2,836.04
SUBTOTAL			\$10,881.72	\$10,881.72
				QUOTE TOTAL: \$10,881.72

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).

BCLD GROUP

TaskRay Home Chatter TaskRay Files Reports Dashboards TaskRay Projects TaskRay Tasks Opportunities Accounts Contacts Knowledge Cases Q-05007 New Quote More

Edit Quote Add Products Add Group Delete Lines Quick Save Calculate Cancel Save

#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	ADDITIONAL DISC	NET UNIT PRICE	NET TOTAL
3	SUS-MAN-BOLDNET	Boldnet Maintenance & Support	1.00	\$973.32		\$973.32	\$973.32
4	SUS-MAN-CONCURRENT FULL USERS	Concurrent Full Users Maintenance & Support	1.00	\$2,248.32		\$2,248.32	\$2,248.32
SUBTOTAL:						\$6,141.72	\$6,141.72
5	SUS-MAN-ADD-ACCTS	Additional Accounts Maintenance & Support	1.00	\$103.00		\$1,236.00	\$1,236.00
UNIT COST			MARKUP		BILLING FREQUENCY: Annual (Upfront)		
LEGACY PRICING REASON: Contracted Price			LEGACY UNIT PRICE: \$103.00				
6	SUS-MAN-PBX STANDARD	PBX Standard Maintenance & Support	1.00	\$97.33		\$1,167.96	\$1,167.96
UNIT COST			MARKUP		BILLING FREQUENCY: Annual (Upfront)		
LEGACY PRICING REASON: Contracted Price			LEGACY UNIT PRICE: \$97.33				
7	SUS-MAN-WARMREP	Warm Replication Maintenance & Support	1.00	\$194.67		\$2,336.04	\$2,336.04
UNIT COST			MARKUP		BILLING FREQUENCY: Annual (Upfront)		

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

BCLD GROUP

TaskRay Home Chatter TaskRay Files Reports Dashboards TaskRay Projects TaskRay Tasks Opportunities Accounts Contacts Knowledge Cases Q-05007 New Quote More

Edit Quote Add Products Add Group Delete Lines Quick Save Calculate Cancel Save

#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	ADDITIONAL DISC	NET UNIT PRICE	NET TOTAL
3	SUS-MAN-BOLDNET	Boldnet Maintenance & Support	1.00	\$973.32		\$973.32	\$973.32
4	SUS-MAN-CONCURRENT FULL USERS	Concurrent Full Users Maintenance & Support	1.00	\$2,248.32		\$2,248.32	\$2,248.32
SUBTOTAL:						\$6,141.72	\$6,141.72
5	SUS-MAN-ADD-ACCTS	Additional Accounts Maintenance & Support	1.00	\$103.00		\$1,236.00	\$1,236.00
UNIT COST			MARKUP		BILLING FREQUENCY: Annual (Upfront)		
LEGACY PRICING REASON: Contracted Price			LEGACY UNIT PRICE: \$103.00				
6	SUS-MAN-PBX STANDARD	PBX Standard Maintenance & Support	1.00	\$97.33		\$1,167.96	\$1,167.96
UNIT COST			MARKUP		BILLING FREQUENCY: Annual (Upfront)		
LEGACY PRICING REASON: Contracted Price			LEGACY UNIT PRICE: \$97.33				
7	SUS-MAN-WARMREP	Warm Replication Maintenance & Support	1.00	\$194.67		\$2,336.04	\$2,336.04
UNIT COST			MARKUP		BILLING FREQUENCY: Annual (Upfront)		

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.

BCLD GROUP

TaskRay Home Chatter TaskRay Files Reports Dashboards TaskRay Projects TaskRay Tasks Opportunities Accounts Contacts Knowledge Cases Q-05007 New Quote More

Edit Quote Add Products Add Group Delete Lines Quick Save Calculate Cancel Save

#	PRODUCT CODE	PRODUCT NAME	QUANTITY	LIST UNIT PRICE	ADDITIONAL DISC	NET UNIT PRICE	NET TOTAL
2	SUS-MAN-ADD-ACCTINTEGRATION	Accounting Integration Maintenance & Support	1.00	\$584.04		\$584.04	\$584.04
3	SUS-MAN-BOLDNET	Boldnet Maintenance & Support	1.00	\$973.32		\$973.32	\$973.32
4	SUS-MAN-CONCURRENT FULL USERS	Concurrent Full Users Maintenance & Support	1.00	\$2,248.32		\$2,248.32	\$2,248.32
5	SUS-MAN-ADD-ACCTS	Additional Accounts Maintenance & Support	1.00	\$1,236.00		\$1,236.00	\$1,236.00
6	SUS-MAN-PBX STANDARD	PBX Standard Maintenance & Support	1.00	\$1,167.96		\$1,167.96	\$1,167.96
7	SUS-MAN-WARMREP	Warm Replication Maintenance & Support	1.00	\$2,336.04		\$2,336.04	\$2,336.04

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).****

The screenshot shows the 'New Quote' form for 'Q-05907' in the BC LD system. The form is in 'Draft' status. The 'Submit for Approval' button is highlighted in the top right corner. The form includes sections for 'Related Details', 'Approvals', 'Quote Terms', and 'Required Fields'.

Primary	Opportunity
☐	Bold Tech-Arlington Independent School District-2026-01-31

Sales Rep	Account
Zachary Gibson	Arlington Independent School District

Primary Contact	Type
Jodyrick Watkins	Quote

First Year Total	Status
\$10,881.72	Draft

Est#	Platform
\$908.81	Manila

Scoping Book URL	Quote Valid From
Jodyrick Watkins	1/12/2026

Accounts Payable Contact	Quote Valid To
Jodyrick Watkins	2/12/2026

Custom SOW

Approvals
Approval Status: Recalled

Quote Terms
One Time Fee: \$0.00
Legacy Pricing Prod: 7.00
Total Profit: 10,881.72
Recurring Fee Start Date: Milestone Recurring

Contract Information
Master Contract: [Link]
Reprint Terms: [Link]
Net 15

Required Fields
Account SOW Fields
Opportunity SOW Fields

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

The screenshot shows the 'New Quote' form for 'Q-05907' in the BC LD system. The form is in 'Draft' status. The 'Generate OAF' button is highlighted in the top right corner. The form includes sections for 'Related Details', 'Approvals', 'Quote Terms', and 'Required Fields'.

Primary	Opportunity
☐	Bold Tech-Arlington Independent School District-2026-01-31

Sales Rep	Account
Zachary Gibson	Arlington Independent School District

Primary Contact	Type
Jodyrick Watkins	Quote

First Year Total	Status
\$10,881.72	Draft

Est#	Platform
\$908.81	Manila

Scoping Book URL	Quote Valid From
Jodyrick Watkins	1/12/2026

Accounts Payable Contact	Quote Valid To
Jodyrick Watkins	2/12/2026

Custom SOW

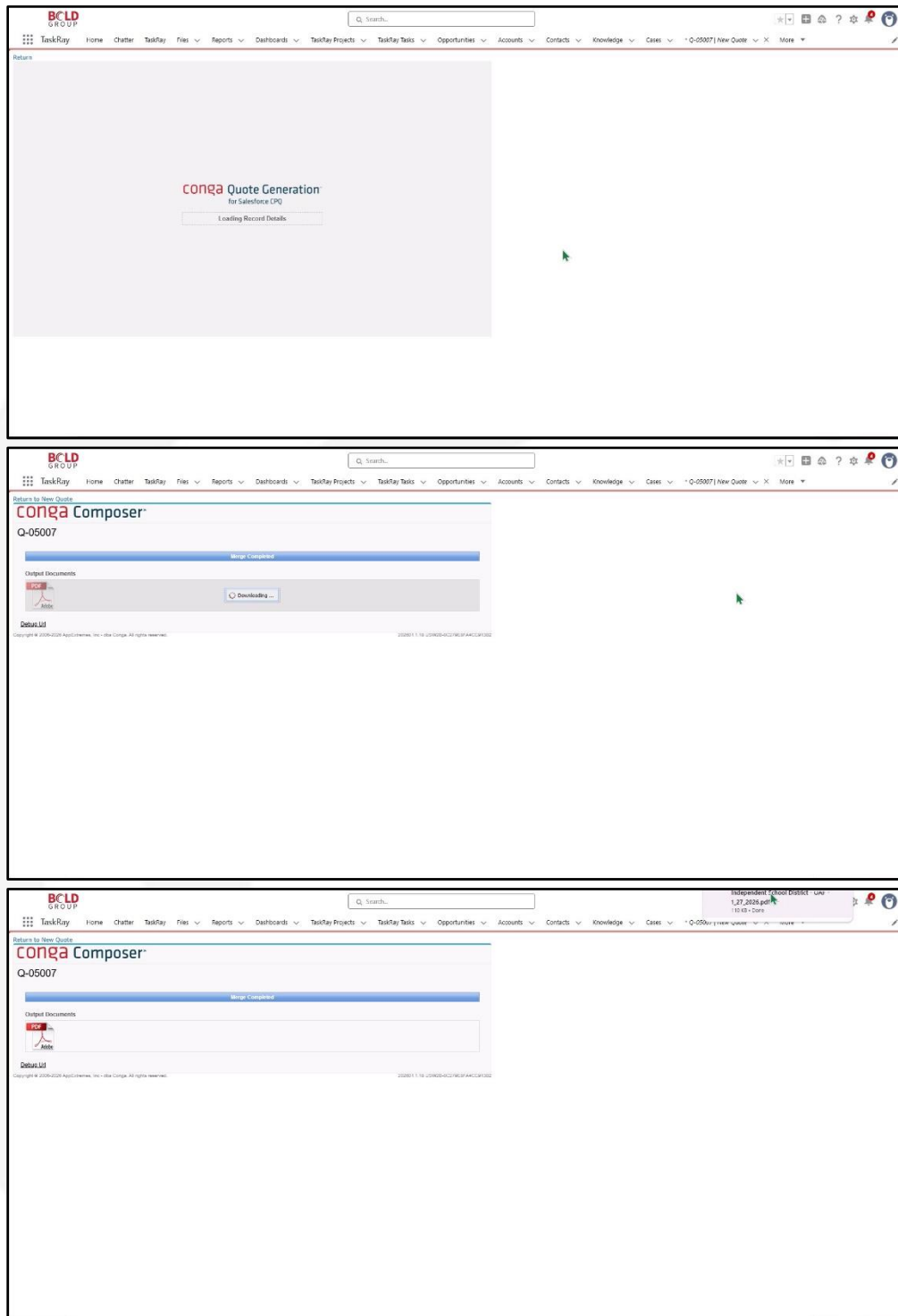
Approvals
Approval Status: Recalled

Quote Terms
One Time Fee: \$0.00
Legacy Pricing Prod: 7.00
Total Profit: 10,881.72
Recurring Fee Start Date: Milestone Recurring

Contract Information
Master Contract: [Link]
Reprint Terms: [Link]
Net 15

Required Fields
Account SOW Fields
Opportunity SOW Fields

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 - GAF - 1_27_2026.pdf

1 / 3 100%

1

2

3

ORDER FORM #Q-05007

CUSTOMER INFORMATION

Company Name: Arlington Independent School District	
Principal Office Address: 600 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) 891-4270	Accounts Payable Contact Phone: (972) 891-4270

CONTRACT TERM AND RENEWAL

Effective Date:	Initial Contract Term Length:	Renewal Term:
	1 Year(s)	1 Year(s)

One-Time Fees Billing Terms
100% upon execution

Recurring Fee Start Date:
6 months after company's signature on this Order Acknowledgment or 30 days after user acceptance/billing start, which will be indicated by an email to customer, whichever occurs first.

Net Payment Terms:
Net 15

TOTAL RECURRING SERVICES AND FEES

Name	QTY	Description	List Price	Discount %	Est. Price
Final Annual Recurring Fees:					0
Total Yearly Recurring:					\$10,851.72

ONE-TIME SERVICES AND FEES

Name	QTY	Description	List Price	Discount %	Est. Price

2 / 3 100%

1

2

3

ONE-TIME SERVICES AND FEES

Name	QTY	Description	List Price	Discount %	Est. Price

ORDER FORM #Q-05007

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 W127, R3128

Arlington Independent School District

Signature: _____

Name: Roderick Watkins

Title: Manager of Safety & Security Services

Date: _____

Bold Technologies Ltd. aka Bold Group

Signature: _____

Name: Larry Glass

Title: President

Date: _____

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

22. Close the case.