



# IMPLEMENTATION GUIDE FOR **SEDONA**OFFICE

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# 1. INTRODUCTION

## — WELCOME

Thank you for choosing SedonaOffice as your business management solution—Bold Group is honored to partner with your organization. We understand that proper installation and implementation of SedonaOffice is crucial to your future experience, and this document contains important information designed to facilitate a successful launch. Please review carefully and share with the relevant members of your team.

## — ABOUT THIS GUIDE

This guide is exclusively for the use of SedonaOffice customers. It is intended as an overview of the implementation process and should be used solely as a reference guide, not as an operating or training manual. It outlines the people, priorities, and processes involved in implementing your SedonaOffice solution and provides information about data migration and mapping, training on your software, resources, as well as implementation FAQs.

SedonaOffice reserves the right to modify the products described in this guide at any time without prior notice. Information in this guide is also subject to change without notice. Company names and data presented in examples are fictitious unless stated otherwise.

SedonaOffice will not be liable for any incidental, indirect, special, or consequential damages that may arise from the use of this guide or the information it contains. The information in this document is proprietary to SedonaOffice.

## — KEY ROLES & RESPONSIBILITIES

Your first experience as a SedonaOffice customer will be with your **Project Manager**, who will oversee all aspects of your system implementation from the time of your purchase through your go-live with SedonaOffice.

BOLD GROUP DEPARTMENT/ROLE	ROLE RESPONSIBILITIES
<b>Sales Department</b>	
— <b>Account Executive</b>	Captures customer goals and helps find solutions for your evolving technology and business needs.
<b>Professional Services Department</b>	
— <b>Project Manager (PM)</b>	Guides and coordinates implementation, reviews sales insights, leads weekly meetings, tracks milestones, escalates issues. Main point of contact during implementation.
— <b>Data Conversion Specialist (Optional)</b>	Helps you plan, coordinate, and guide you as you load your existing data into SedonaOffice.
— <b>CPA (Optional)</b>	Reviews Chart of Accounts, costing methods, and tax setup.
— <b>Application Consultant</b>	Enhances your self-guided training with 1:1 training on setup tables and application use targeted to your specific business practices.

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**Customer Success Department**


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**Technical Support Department**


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- **Technical Support** Helps resolve errors or technical issues disrupting fully implemented and functional systems. Provides support for software updates.
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The chart below identifies the essential roles and responsibilities that should be assigned within your organization during implementation. Typically, one person handles multiple roles and functions, and in small businesses, one person may be responsible for all functions described below. It's important that anyone who will eventually own these responsibilities long-term be involved in the implementation process.

CUSTOMER ROLE/FUNCTION	ROLE RESPONSIBILITIES
<b>Implementation Lead</b>	Leads your implementation effort and serves as primary contact. Coordinates customer stakeholders and resources to complete implementation. This role interacts with the software more than anyone on your team.
<b>Data Mapping Owner</b>	Sources, organizes, and maps data and ensures accuracy of data before upload. Knowledge of Excel is highly recommended.
<b>Accounts Receivable, Accounts Payable &amp; Accounting</b>	Manages customer billing, payment processing, and collection activities within the new system; vendor payment, purchasing; chart of accounts and general ledger setup, financial reporting requirements
<b>User Trainer</b>	Champions system adoption, trains system users and serves as your primary internal resource for ongoing user questions and support after go-live.
<b>Field Service Technician Manager/Representative</b>	Manages and train field service team in deploying SedonaOffice.
<b>User Administrator</b>	Administers users, sets up permissions and grants access to SedonaOffice users.

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## — ENSURING A SUCCESSFUL IMPLEMENTATION

Getting your system set up correctly lays the groundwork for using your software to its full potential. Your team's active participation is essential to implementation success. Please plan for your team to invest a minimum of 3-4 hours every week throughout implementation for activities like data preparation, user training, system testing, and configuration reviews.

You can help ensure a successful implementation by:

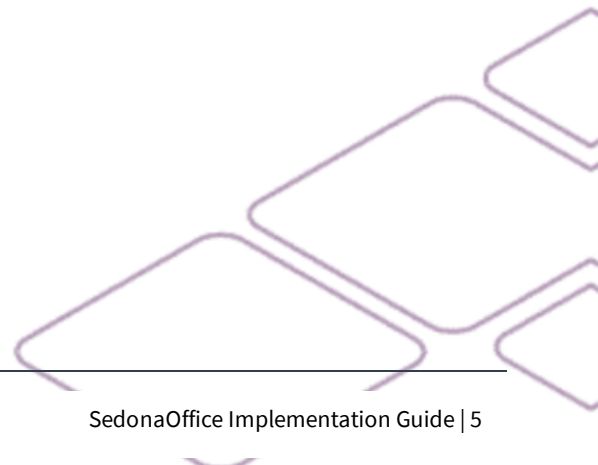
- Engaging proactively in weekly status calls and follow-up tasks
- Providing timely responses to requests for information
- Assigning someone from your team to coordinate internally and communicate with us regularly and provide availability with required team members for implementation and training activities
- Allocating time each week for self-guided learning

- Identifying key users early: Determine who will need system access and what their roles will be
- Preparing, cleaning, and organizing data as soon as possible to avoid delays in data mapping and migration
- Understanding the structure of SedonaOffice and how it supports your business processes prior to implementation training helps your implementation team set up your system to meet your needs
- Having realistic expectations: Be prepared for some adjustment time as your team learns the new system

For more helpful information and answers to common questions about the implementation process, please see our implementation **Frequently Asked Questions (FAQs)** at the end of this guide.

## — OUR PROMISE

We recognize that implementing SedonaOffice represents a significant investment in your business's future. Our promise is simple: we are fully committed to your success and will be your trusted partner throughout this entire journey. Your success is our success, and we're dedicated to delivering both exceptional software and exceptional experience. Our experienced implementation team will work closely with you and your organization to ensure you have a successful implementation and feel confident using your new software.



## 2. GETTING STARTED

### — PAY YOUR ONE-TIME FEE

Within a week of signing your Order Form/Statement of Work, your organization's designated billing contact will receive an email notification with the invoice to pay your one-time fees.

- SedonaOffice's online billing portal is the most secure way to pay your bill. [Follow these instructions](#) to create your account, set up payment methods, and pay your invoice for one-time fees.

**Important Note:** We cannot begin your SedonaOffice implementation or add your project to our schedule until we have received your payment. Thank you for your prompt attention and understanding.

If you have billing questions or need help with an invoice, please contact the SedonaOffice AR/billing team at [Perennial\\_AR@boldgroup.com](mailto:Perennial_AR@boldgroup.com).

### — REVIEW E-LEARNING (BOLDU) & SETUP GUIDES

A successful implementation starts with a solid understanding of how SedonaOffice supports your business workflows. Before mapping any data, it's critical that every team member involved in the project understands the system's structure and capabilities.

The resources below are designed to give you and your team the foundational knowledge needed to make informed choices during implementation and maximize the value of your SedonaOffice software.

#### Start with Required eLearning:

 Required SedonaOffice e-Learning: [Getting Started in SedonaOffice](#)

Learning Objectives:

- Understand how to use the tools in SedonaOffice to navigate and format your information.
- Gain a general knowledge of the tabs in the module.
- Become familiar with the available reports.

 BOLDU: [Bold Group's Learning Portal](#)


#### Review Guides to Completing Setup Tables:

Your SedonaOffice software relies on several foundational data tables that must be set up early in the implementation process. These setup tables include essential information like your chart of accounts, sales tax, work order types, part types, and more categories that form the backbone of your system.

For a faster implementation and go-live, we recommend that you review these setup guides and gather a list of questions to review with your Application Consultant. During 1:1 training, your Application Consultant will review the most important tables and answer questions specific to your business.

 Review Setup Table Guides: [SedonaOffice Setup Table Guides](#)

## More Resources for Setting Up Your System:

 Key lessons to help you set up and use SedonaOffice:

- [SedonaSetup Overview](#)
- [Accounts Payable Setup](#)
- [Accounts Receivable Setup](#)
- [General Ledger Setup](#)

## — IMPLEMENTATION KICKOFF CALL

Your Project Manager will reach out to schedule your kickoff call within 7-10 days of payment. The implementation kickoff call serves to align both teams on project goals, timelines, and responsibilities while establishing clear communication and setting expectations for a successful implementation.

### Who Should Attend:

The contact you have identified as your implementation lead, along with anyone you expect to be involved in data conversion, setting up or supporting your system, managing AR/accounting functions, or training your staff and field service team in the software should attend this meeting. Please review Customer Key Roles on pg. 3 of the Introduction for more information.

### Meeting Agenda:

- Implementation team introductions
- Discovery/validation of objectives
- Implementation process overview
- Data conversion overview
- Agreement on success definition
- KPI alignment
- Project scope, timeline, and responsibilities
- Change management planning
- Initial deliverables and shared calendar

## — LOGGING INTO SEDONAOFFICE



To ensure your system is set up correctly from the start, we work with you through the initial configuration before granting system access. Your login credentials will be shared prior to your first training session with your Application Consultant.

### Login Help & Resources:

- [Logging into SedonaOffice and Resetting Password](#)

- [Adding Users from Your Company](#)

## — SETTING UP FORTE FOR PAYMENT PROCESSING

CSG Forte is Bold Group's exclusive partner for payment processing and is fully integrated with the SedonaOffice platform. Please notify your Project Manager during your kickoff call if you are using the Forte integration for payment processing. A PaySimple representative (on behalf of CSG Forte) will reach out to discuss rates and guide you through the sign-up process.

### What is PaySimple?

PaySimple is the payments division of Bold Group's parent company, EverCommerce, and works directly with CSG Forte to support Bold Group customers. A PaySimple representative will reach out to you initially if you plan to use the Forte integration.

### Completing Your Forte Application:

You will apply for approval through Forte directly. Your project manager will coordinate with PaySimple to reach out to you initially, but going forward you will manage your relationship directly with Forte.

When completing your Forte Application, please select the following responses:

- Business Category: Select **Professional, Personal and Business Services**
- Type of Business: Select **A11700 - Protective and Security Services**
- Intended Use: Select **Sales**
- Most Transactions: Select **Via - Internet**

Your PaySimple representative will guide you through the Forte application and provide information about supporting documentation you will need to submit with your application. Some of the most frequently requested documents include: voided check to confirm bank account, recent bank statements, phone bill to verify the phone number.

We recommend starting the application process 3-4 weeks before your go-live date to ensure your Forte integration is set up and does not delay your SedonaOffice go-live date.

**Important Forte Billing Note:** Forte billing begins upon application approval and is not tied to your SedonaOffice go-live date.

### Key Things to Know about the Forte Integration:

- Once your application is approved and you receive your Forte credentials, Bold Group's implementation team will work with you to enter those credentials into SedonaOffice.
- PCI compliance is managed through CSG Forte. When your Forte application is complete and accepted you will receive an email for PCI compliance. **Be sure to complete this form so that your company is a PCI-compliant merchant and is not charged additional fees.** To learn more about PCI compliance please read Forte's [Merchant PCI Compliance Info & FAQs](#).

- After your go-live, you will be responsible for gathering new payment info for your customer base. (We recommend having your customers enter this information themselves via your customer user portal to ensure accuracy.)
- Porting your existing credit card/ACH data in a PCI-compliant fashion is possible but will need a formal scoping to review feasibility, pricing, and requirements. Reach out to your Account Executive for more information.

## — WHEN YOUR SEDONA OFFICE BILLING BEGINS

Your monthly recurring billing for SedonaOffice typically begins **6 months** after signing your Order Acknowledgement (OA) form OR **30 days** after your User Acceptance Testing begins, whichever date comes first. Always refer to your specific Order Acknowledgement form for the exact terms of your agreement, as individual contracts may vary.

If your implementation timeline extends beyond this 6-month period, billing may begin before your system goes live. To prevent this situation and ensure you receive maximum value from your investment, we need your team's active participation, timely completion of tasks, and prompt response throughout implementation. We appreciate your team's engagement throughout implementation and will work closely with you to help you achieve your desired go-live date.

## 3. IMPLEMENTATION PLAN

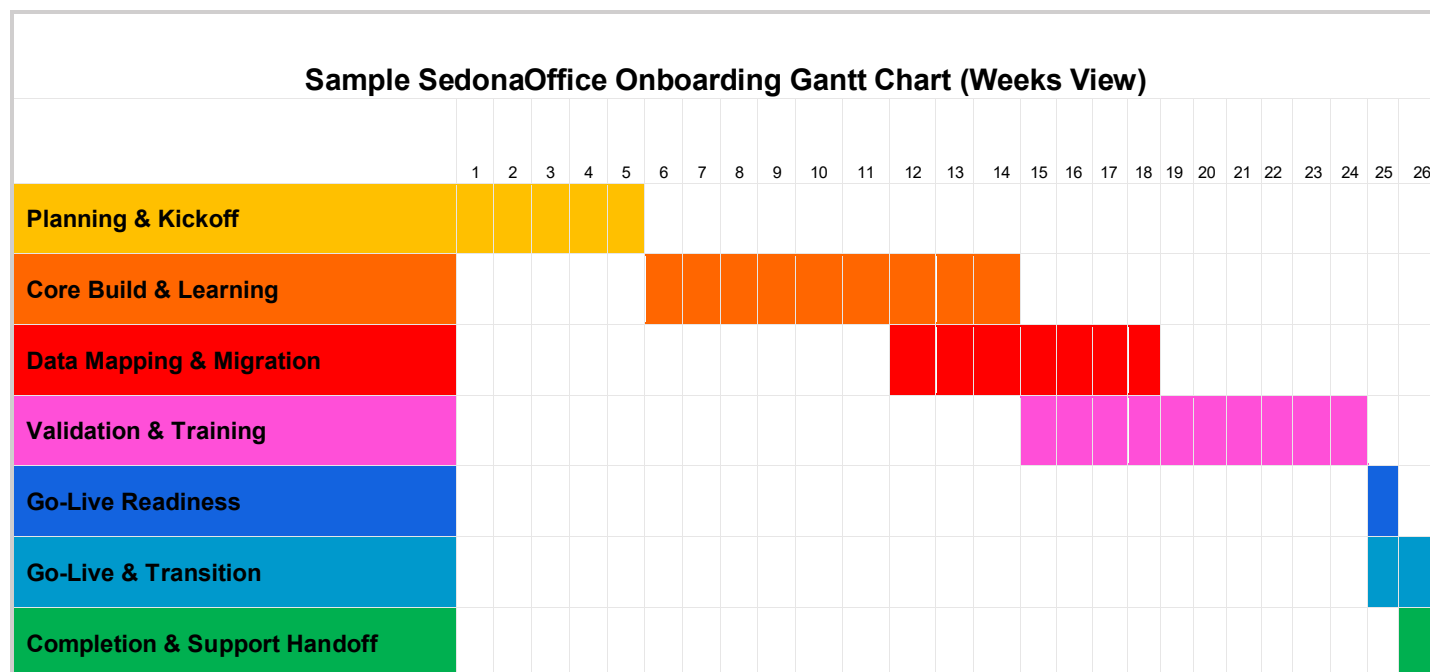
### — IMPLEMENTATION PHASES

The chart below outlines the key phases of your implementation journey. Each phase builds upon the previous one and is designed to deliver specific value while moving you closer to go-live. While this chart provides a high-level view of the process, your project manager will walk you through the detailed requirements and tasks within each phase as you progress through your implementation.

Please note that the time investment varies greatly based on your business needs and the complexity of your data. Your project manager can provide better estimates for your specific situation.

PHASE	DESCRIPTION	ESTIMATED CUSTOMER EFFORT
<b>Planning &amp; Kickoff</b>	Project manager assigned and kickoff call scheduled. Review project goals, timelines, and roles, and align on expectations.	1-2 hours
<b>Core Build &amp; Learning</b>	System configuration and data staging begins. Customers build foundational knowledge of SedonaOffice application through BoldU and knowledge base resources.	20-25 hours
<b>Data Mapping &amp; Migration</b>	Your project manager and data conversation specialist (if applicable) provides instructions and supports you in mapping your organization's data.	15-20 hours
<b>Validation &amp; Training</b>	Customer replicates business processes in SedonaOffice environment. CPA consultation and 1:1 training sessions occur (if applicable).	20-25 hours
<b>Go-Live Readiness</b>	Final data sign-off and readiness checklist completed. Go-Live date is confirmed.	3-4 hours
<b>Go-Live &amp; Transition</b>	Live data conversion completed. Project Manager ensures functionality is in place and supports immediate post-Go-Live review.	4-6 hours
<b>Completion &amp; Support Handoff</b>	Project completion documented. A final review is held and feedback is gathered. Introduction and handoff to Bold Group Support for ongoing support.	2-3 hours

The following chart is an illustration of the execution of each phase. Your plan will vary depending on your specific requirements and timeline.



## — DATA MAPPING & MIGRATION

This optional service provides data conversion from your existing system to the SedonaOffice platform. This process requires careful planning and active participation from your team to ensure data accuracy and completeness.

**Important Note:** Your organization should expect to dedicate approximately 15-20 hours to data preparation activities. The quality of your preparation directly impacts the success of your implementation and your organization's ability to use SedonaOffice to its full potential.

A specialist from our Data Conversion team will assist you throughout this process, offering guidance on effectively mapping your data and helping you populate your Master Template.

During the Administrative Training and data conversion for SedonaOffice, you might find new tables not in your current system or existing tables too small for conversion, requiring manual data entry.

## Understanding How SedonaOffice Supports Your Business

The data mapping phase is your opportunity to thoroughly review and clean your existing data. Take time to evaluate how your customer relationships are organized—do you use master and sub-accounts? Do you fully understand how billing works in SedonaOffice to ensure those accounts are set up correctly?

Please keep in mind this will be a collaborative, two-way process. While we will work to understand how your data is currently structured, you will need to align your data with SedonaOffice's data framework and workflows. This may involve some adjustments to your data and, occasionally, refining your internal processes.

Getting this right at the outset ensures accurate configuration, smooth workflows, and successful outcomes throughout the project.

## Manually Importing Your Data

If your organization is not using Bold Group's optional data conversion services, then you will be entering your data and creating customer records manually.

Visit the SedonaOffice knowledge base to learn more about [adding customers](#) through SedonaOffice's Customer Wizard.

## Data Migration & Mapping Process

PHASE	DESCRIPTION	ESTIMATED EFFORT
<b>Data Mapping</b>	Customer obtains export of current data source and maps data into Master Template; removes all incorrect data prior to mapping into Master Template.	4-6 weeks
<b>C1 Test Conversion</b>	Completed Master Template is imported into SedonaOffice. No downtime.	1 day
<b>Data Audit</b>	Customer audits the data imported to SedonaOffice and makes required changes <b>on the Master Template NOT in SedonaOffice</b>	2 weeks
<b>C2 Test Conversion</b>	Additional test pass to see data changes reflected before go-live.	1 day
<b>Go-Live Conversion</b>	Completed Master Template is imported into SedonaOffice; all users must be logged out. Customer must sign data sign-off form prior to go-live conversion; any data changes required post-go live will be customer's responsibility	4 hours

## Preparing for Data Mapping & Staging

A key part of your implementation is completing the Master Template. This document helps translate your existing data into the format required by SedonaOffice and ensures a clean, accurate setup.

**Reminder:** It is your responsibility to extract data from current systems and accurately enter or format that information in the Master Template. This is an ongoing task throughout implementation, and the designated data mapping owner from your team should track all updates (e.g., newly acquired customers, changes to existing records).

The more complete and accurate your data is upfront, the fewer adjustments you'll need later in C1/C2 test conversions. To prepare for data mapping and ensure a successful data migration, we recommend:

- Assigning a team member who is proficient in Excel and experienced with data entry.

- Gathering clean, updated data for customers, sites, systems, invoices, and recurring billing.
- Reviewing how fields are currently formatted (e.g., phone numbers, contact names, tax details).

## Customer Responsibilities:

The following tasks are required to complete the data mapping phase of your implementation:

- Complete setup tables. These foundational data tables include essential information like your chart of accounts, work order types, part types, and more categories that form the backbone of your system and must be set up early in the implementation process.
- Gathering data source files, whether by extracting from current system, or contacting current vendor to get a full data export
- All cleaning, organization and manipulation of your data
- Exploring the setup tables in your database and evaluating how your data elements align with the import fields available in our Master Template
- Exploring the setup tables in your database and review the Master Template to understand what data elements can be brought in, and which cannot
- Enter data into Master Template
- Reviewing data mapping
- Validating migrated data for accuracy
- Track updates and changes to data during implementation process

## Bold Group Deliverables:

During the data mapping phase of your implementation, Bold Group will provide the following deliverables:

- Master Template and instructions in completing
- System configuration
- Actual data transfer (test passes and final cutover)
- Providing feedback and answer questions on data mapping

## Key Milestones

The following milestones must be met to complete the data mapping and migration phase of your implementation:

- Master Template is completed (typically within 4-6 weeks)
- Test conversions C1 and C2 are executed
- PM hosts weekly Microsoft Teams meetings (beginning after kickoff and continuing through Go-Live):
  - Review of weekly required training tasks (e.g., building customers, creating work orders, proposals, appointments)

- Discuss progress and roadblocks
  - Escalate technical questions as needed
  - Reinforce training goals and accountability
  - Monitor KPIs and overall progress
- Master Template finalized and signed off on
  - SedonaOffice environment populated with test data

## — VALIDATION & TRAINING

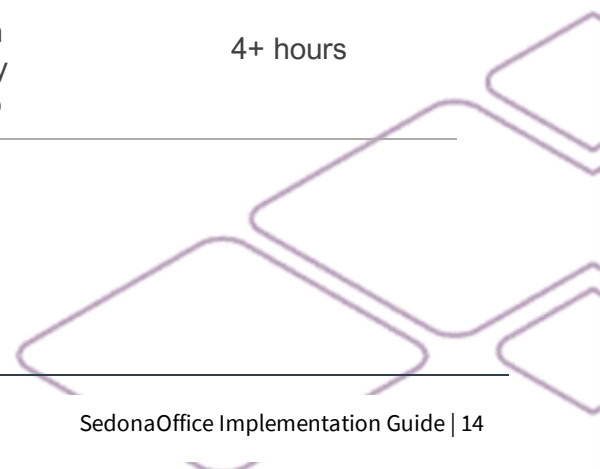
Your SedonaOffice training program combines self-guided learning with personalized 1:1 sessions. This approach ensures you gain the confidence and skills needed to effectively manage your business with your new software from day one.

Self-guided training covers application fundamentals—how to navigate the system, understand key workflows, and manage essential setup tasks—and serves as the foundation for everything that follows. Once you've completed these modules, you'll participate in targeted one-on-one sessions with an application consultant who will focus on your specific business processes and address any questions that came up during your self-guided learning.

**Note:** This phase of your implementation runs in tandem with Data Mapping & Migration and is expected to take 2-3 months, assuming your organization is able to devote time every week to self-guided learning. A common cause of implementation delays is customers not completing self-guided training in a timely manner, which is a prerequisite to schedule your organization-specific 1:1 training sessions with your application consultant.

### Training & Learning Modules:

MODULES	DESCRIPTION	ESTIMATED EFFORT
<b>Self-Guided Learning</b>	Customer completes self-guided training in the BoldU learning management system and reviews relevant content in the SedonaOffice knowledge base, using SedonaOffice to replicate daily processes (e.g., RMR setup, invoicing workflows) as you learn.	20-25 hours
<b>CPA Consultation</b> (if applicable)	CPA supports: <ul style="list-style-type: none"> <li>• Chart of Accounts design &amp; validation</li> <li>• Standard vs. Average costing strategy</li> <li>• Tax configuration and reporting setup</li> </ul>	4+ hours



<b>Application Consultant Training</b>	1:1 training and Q&A sessions tailored to customer-specific needs and processes.  <u>Prerequisite:</u> customer completes all required self-guided learning and sandbox practice prior to booking training sessions are booked.	40+ hours
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## Required Self-Guided Learning

You will complete the following courses to gain an understanding of application basics before booking your 1:1 application training.

TRAINING OR COURSE	LEARNING OBJECTIVE	URL/LOCATION
<b>BoldU Coursework</b>	SedonaOffice User Courses SedonaOffice Setup Courses	<a href="#">BoldU Learning Platform</a>
<b>SedonaOffice: Getting Started</b>	Understand SedonaOffice navigation and layout	<a href="#">Getting Started in SedonaOffice</a>
<b>Add Customer, Site, System</b>	Ability to create customer, site, and system records	<a href="#">Add a Customer</a> <a href="#">Add a Site</a> <a href="#">Add a System</a>
<b>Setup Tables</b>	Review complete setup table guides	<a href="#">SedonaOffice Setup Table Guides</a>

## Administrative Setup Training

Administrative Training is a key foundational step in your SedonaOffice onboarding. This portion of training focuses on **system configuration, core setup tables, and accounting structures** that must be established before your team begins day-to-day operational or Application Training.

Where Application Training teaches your team *how* to use SedonaOffice for daily workflows, Administrative Training ensures the underlying system is configured correctly so those workflows operate smoothly and accurately.

### What to Expect from Administrative Training

Administrative Training is hands-on, fast-paced, and highly focused on completing as many setup tables as possible. Your trainer will guide you through the essential configuration areas that form the backbone of your SedonaOffice environment—such as accounting setup, sales tax, inventory configuration, work order and job settings, and other system preferences.

To get the most value from your training sessions:

- Ensure you have **reliable, high-speed internet** for uninterrupted participation.

- We strongly recommend using **multiple monitors**—one for following along in SedonaOffice and another for viewing the SedonaSetup Guide or shared training materials.
- Keep the **SedonaSetup Guide open and accessible**, as it will be referenced throughout your sessions.
- Because the content builds sequentially, participating staff should **delegate daily responsibilities** during training to avoid interruptions.

## Before Your First Administrative Training Session

To ensure training is productive and efficient, please complete the following in advance:

- Review the SedonaSetup Guide to familiarize yourself with key concepts.
- Ensure your **Chart of Accounts** has been entered into SedonaOffice and is ready for review on Day 1.
- Verify that all required team members can attend and are available for the full training session.

## Why Administrative Training Matters

Administrative Training establishes the structural foundation of your SedonaOffice system. An accurate and complete setup leads to:

- Smoother and more effective Application Training
- Reduced rework later in the project
- Faster adoption during go-live
- Strong data accuracy and long-term system stability

All web-based training sessions will be recorded and provided to your organization for future reference.

If you have questions about your training schedule or how to prepare, please reach out to your **Project Manager**.

Topic	Who Should Attend	Time Estimated
Introduction to SedonaOffice Administrative Training	Decision makers from Key Operational Departments; Administration, Accounting, Installing, Service, Sales	1 Hour
Accounts Receivable/ General Ledger/Accounts Payable	Decision makers from Administration, Accounting	2-3 Hours
Client Management/Accounts Payable	Decision makers from Administration, Accounting, New Accounts Department	2 Hours

## Materials & Resources Needed for Administrative Training

To ensure your Administrative Training sessions are productive, please have the following information prepared and accessible. These items will be reviewed with your trainer and will be used to configure your SedonaOffice environment accurately.

### Current Chart of Accounts

We will review your *SedonaOffice* Chart of Accounts during training.

If you plan to make changes to your existing account structure, please finalize your revised Chart of Accounts beforehand and be ready to enter it into SedonaOffice.

### Branch Information

A list of all branch locations, including addresses, phone numbers, and any relevant regional distinctions.

### Invoice Items / Services List

A complete list of all items and services your organization invoices to customers.

### Sales Tax Details

A list of tax jurisdictions you remit to, along with your applicable rates and rules. Be prepared to discuss your tax processes.

### A/P and A/R Payment Terms

A list of all payment terms used for Accounts Payable and Accounts Receivable.

### System Types Installed

A list of the types of systems your organization installs or services (e.g., Burglar, Fire, Access Control, CCTV, etc.).

### Contract Types

A list of contract types you use in your business (e.g., 1-year, 3-year, maintenance, inspection agreements, monitoring-only, etc.).

### Customer Cancellation Workflow

An outline of the steps your team follows when processing customer cancellations.

### Collections Process Workflow

A summary of your collection's workflow, including:

- a. When and how customers are escalated
- b. The actions taken throughout your collections cycle (e.g., notices, holds, follow-up steps)

## User Groups and Operations Setup Tables

Topic	Who Should Attend	Estimated Time
Users & User Group Security	<ul style="list-style-type: none"> <li>Decision makers from Administration</li> <li>IT Dept (if responsible for User Groups and User Information)</li> </ul>	1-2 Hours
Service & Inventory	<ul style="list-style-type: none"> <li>Decision makers from Administration, Accounting, Service</li> </ul>	2-3 Hours
Job Management	<ul style="list-style-type: none"> <li>Decision makers from Administration, Accounting and Installation</li> </ul>	2-3 Hours

(Installation)		
Central Station (Optional)	<ul style="list-style-type: none"> <li>Decisions makers from Administration, Central Station Department (This is for Customers who will not be integrating with Manitou and do not have their own Central Station)</li> </ul>	1 Hour (Optional)

## Materials & Resources Needed for Administrative Training

To support accurate system configuration, please have the following information prepared for your Administrative Training sessions. This ensures we can set up your employee structure, service workflows, inventory, and operational processes correctly in SedonaOffice.

- Employee Listing  
A complete list of employees who will appear in SedonaOffice, including those who:
  - Will log into and use the SedonaOffice application
  - Perform Service Calls (Technicians)
  - Perform Installation Jobs (Installers)
  - Work in Sales or Estimating roles
- Department Listing  
All departments used in your organization (e.g., Service, Install, Accounting, Sales, Monitoring, Warehouse, Admin).
- Inventory Item / Product List  
A list of inventory parts or product lines your company carries or uses.
- Warehouse List  
A list of all warehouses, stocking locations, and vehicles that store inventory.
- Service Billing Rates & Plans  
Your service billing structure, including hourly rates, flat-rate schedules, and inspection billing plans.
- Service Problem Codes  
A list of the codes or reasons used to classify why a customer requires service (e.g., low battery, communication failure, equipment malfunction).
- Service Resolution Codes  
A list of codes or descriptions used to record how a service issue was resolved.

## Completion and Final Review

Topic	Who Should Attend	Estimated Time
Sales Management (Optional)	<ul style="list-style-type: none"> <li>Decision makers from Administration, Sales</li> </ul>	1 Hour (Optional)
Forms Review (Optional) or	<ul style="list-style-type: none"> <li>Decision makers from Administration, Accounting</li> </ul>	1-2 Hours (Optional)

Final Administrative Training		
Review of Setup Tables		
Final Administrative Training	<ul style="list-style-type: none"> <li>Decision makers from Administration, Accounting</li> </ul>	Remaining Time
Review of Setup Tables		
Open Discussion-Review of Implementation Plan	<ul style="list-style-type: none"> <li>Decision makers from Administration, Accounting</li> </ul>	Remaining Time

## Forms Review Samples

Please have the following items available for Training:

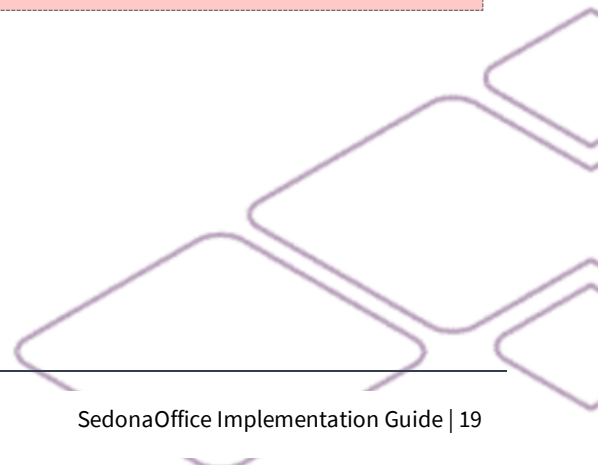
1. Customer Invoice
2. Customer Statement
3. Accounts Payable Check
4. Service Ticket
5. Installation Work Order

## Application Training

Application Training is the hands-on, end-user portion of your SedonaOffice onboarding. While Administrative Training focuses on building your system foundation, Application Training teaches your team **how to use SedonaOffice in their daily roles**—from customer management and billing to service, inventory, jobs, and reporting.

This training focuses on real operational workflows and is designed to ensure your team can confidently perform their day-to-day, weekly, and monthly tasks using SedonaOffice.

**Important Reminder:** Your 1:1 training hours typically expire 6 months after your contract and statement of work have been signed. Please complete your self-guided training as soon as possible so you will have time to schedule and complete your application training and use the hours purchased by your organization.



## What to Expect from Application Training

Application Training is highly interactive and centers on practical, scenario-based learning. Your trainer will guide your team through the modules, tools, and workflows they will use every day, including:

- Managing customers, sites, and system records
- Entering and processing payments
- Creating, dispatching, and closing service tickets
- Running recurring billing cycles
- Managing inventory and purchasing
- Handling job costing, work orders, and financial workflows
- Producing reports and reviewing system activity

To get the most out of these sessions:

- Ensure reliable, high-speed internet connectivity.
- We strongly recommend **multiple monitors**—one for following along directly in SedonaOffice, and another for viewing meeting materials and references.
- Encourage your team to be familiar with how your organization **currently** performs key processes so they can compare, ask informed questions, and understand how SedonaOffice workflows may differ.

## The Importance of Application Training

Application Training is essential to your long-term success with SedonaOffice. These sessions:

- Build confidence in using the system day-to-day
- Help your staff understand how their existing processes map into SedonaOffice
- Highlight where workflow changes may be needed
- Reduce errors and unnecessary support requests post-go-live
- Ensure your team is prepared for real production activity on Day 1

It's important for participants to attend fully, remain engaged, and be open to modifying current workflows. SedonaOffice has established best practices and standard processes—adopting these will help your team operate more efficiently and consistently across the organization.

## How to Prepare for Application Training

To ensure the most productive training experience:

- Complete all required Administrative Training and setup tasks prior to your Application sessions.
- Have key users review the SedonaSetup Guide or any role-specific materials provided in advance.
- Encourage end users to bring questions, especially around processes unique to your business.
- Ensure attendees are available for the **entire** session without interruption—this material builds sequentially.

All virtual training sessions will be recorded and provided to your organization for future reference.

### Questions or Scheduling Support?

If you have questions about your Application Training schedule or how to prepare:

- Contact your **Project Manager**

To get the most value from your personalized training time, it's essential to complete the [SedonaOffice Setup Table Guides](#) before your session and come prepared with specific questions about how the software applies to your unique workflows and business needs.

Module	Topic	Estimated Time
Client Management	<ul style="list-style-type: none"> <li>• New Customer Creation</li> <li>• Manage Customer Info: Customer, Site, System, Contacts, Bill Tos, Credit Card/ACH, RMR</li> <li>• Cancellations</li> <li>• Chain Accounts</li> <li>• Master Account Management</li> </ul>	2-3 hours
Accounts Receivable	<ul style="list-style-type: none"> <li>• Cycle Billing (Recurring Billing)</li> <li>• Miscellaneous Invoices</li> <li>• Credit Memos</li> <li>• Cash Receipts</li> <li>• Statements</li> <li>• Printing Invoices</li> <li>• Unapplied Cash &amp; Credits</li> <li>• Collections</li> </ul>	3 hours
Inventory	<ul style="list-style-type: none"> <li>• Inventory Part Creation</li> <li>• Parts Explorer Functions</li> <li>• Warehouses</li> <li>• Transfers</li> <li>• Issues and Returns</li> <li>• Repair Orders</li> </ul>	2 hours
Service & Inspections	<ul style="list-style-type: none"> <li>• Creating a Service Ticket</li> <li>• Printing Service Tickets</li> <li>• Schedule a Technician</li> <li>• Technician Dispatching</li> <li>• Resolving a Service Ticket</li> <li>• Billable Items</li> <li>• Invoice the Service Ticket</li> <li>• Close the Service Ticket</li> <li>• Setting up Inspection Information</li> <li>• Inspection Ticket Generation</li> <li>• Inspection Ticket Processing</li> </ul>	3-4 hours
Job Management (Installations)	<ul style="list-style-type: none"> <li>• Creating an Installation job</li> <li>• Task Management</li> <li>• Setting up billable charges (Install charges, parts charges, recurring charges)</li> <li>• Parts list</li> <li>• Commissions</li> </ul>	3-5 Hours

	<ul style="list-style-type: none"> <li>• Job Costing</li> <li>• Purchasing Parts</li> <li>• Receiving Parts</li> <li>• Issuing Parts to the job</li> <li>• Approving Tasks</li> <li>• Invoicing the Job</li> <li>• Closing the Job</li> </ul>	
Accounts Payable	<ul style="list-style-type: none"> <li>• Entering Vendors</li> <li>• Entering Bills</li> <li>• Selecting Bills for Payment</li> <li>• Printing A/P Checks</li> <li>• Recurring Bills &amp; Checks</li> <li>• Purchase Orders</li> </ul>	3 hours
General Ledger	<ul style="list-style-type: none"> <li>• Accounting Periods</li> <li>• Account Register</li> <li>• Journal Entries</li> <li>• Deferred Income Recognition</li> <li>• Closing Accounting Period</li> </ul>	1 hour
Proposals and eForms (Not applicable if using WeSuite integration)	<ul style="list-style-type: none"> <li>• Proposal Creation and Queue Management</li> <li>• Charges Tab</li> <li>• eForms customer proposal template</li> <li>• eForms Template PDF Overlay</li> <li>• Proposal creation and eForm delivery lifecycle</li> <li>• Converting Proposal to Work Order</li> </ul>	2 hours
Sedona-X Mobile App Training (per session)	<ul style="list-style-type: none"> <li>• General Navigation</li> <li>• <b>Customer</b> <ul style="list-style-type: none"> <li>○ Searching, viewing, calling customers, accepting payments</li> </ul> </li> <li>• Processing Go-Back and Resolved tickets</li> <li>• <b>Service Tickets</b> <ul style="list-style-type: none"> <li>○ Searching</li> <li>○ Appointments</li> <li>○ Adding/editing/resolving</li> <li>○ Customer Signature</li> </ul> </li> <li>• Scheduling Inspection Tickets and impact on Sedona-X Mobile App</li> <li>• Scheduling Jobs and impact on Sedona-X Mobile App</li> <li>• Inventory Setup and impact on Sedona-X Mobile App</li> </ul>	2 hours per session

## Migration from Bold Group Legacy Software

If you are upgrading to SedonaOffice from one of Bold Group's legacy software systems, please note that your implementation process may differ slightly from the standard procedures outlined in this guide. Your project manager will provide specific instructions for data mapping and address any legacy system-specific requirements that may arise during implementation.

## User Acceptance Training

User Acceptance Testing (UAT) should be conducted at least once after completing the application training, populating all setup tables and application preferences in SedonaOffice. The goal of the UAT is for the customer to navigate through each module of SedonaOffice, following a customer's lifecycle from prospect to service billing. User Acceptance Testing (UAT) is your opportunity to validate that the system is configured correctly and confirm that your team can confidently perform their daily tasks.

Document any issues, questions, or unexpected behaviors you encounter. Your project manager will coordinate with you to prioritize and resolve any findings that emerge during testing.

Remember, UAT is your final checkpoint before going live. The more thoroughly you test during this phase, the smoother your transition will be. Come prepared with realistic data scenarios and involve the actual users who will be working in the system daily—their feedback is invaluable for ensuring long-term success.

## **Customer Responsibilities:**

The following tasks are required to complete the validation and training phase of your implementation:

- Devote time every week to self-guided learning
- Complete all self-guided training and coursework in knowledge base and BoldU
- Schedule and attend Administrative Setup Training and Application Training with Bold Group Application Consultant, bringing questions about how the software applies to workflows and business needs
- Step through each functional module of SedonaOffice in the lifecycle of a customer, using your data to ensure all necessary processes are in place and users are trained
- Document any issues, questions, or unexpected behaviors
- Conduct User Acceptance Training with your Bold Group Project Manager and Application Consultant

## **Bold Group Deliverables:**

During the validation and training phase of your implementation, Bold Group will provide the following deliverables:

- Instructions for self-guided training and coursework
- Providing Administrative Setup Training, Application Training, and CPA Consultation (if applicable) with Q&A sessions tailored to your specific business processes and needs
- Verifying accuracy of setup tables
- Project manager coordination to prioritize and resolve any findings from UAT
- Support for validating system configuration and ensuring team confidence in daily tasks

## **Key Milestones**

The following milestones must be met to complete the validation and training phase of your implementation:

- BoldU and Knowledge Base training completed before 1:1 training
- Demonstrate ability to complete workflows in the SedonaOffice environment prior to Go-Live
- Setup table training

- Completed Master Template
- Validating the data in the system

## — GO-LIVE READINESS & TRANSITION

The go-live phase represents the culmination of your implementation efforts and marks the official transition to your new SedonaOffice software. This critical phase requires careful coordination between your team and ours to ensure a smooth cutover with minimal business disruption. The process is divided into two key stages: Go-Live Readiness preparation and the actual Go-Live & Transition Day.

### Go-Live Readiness

During this preparation week, we complete all final validations and confirmations needed for a successful go-live and work together to complete the go-live checklist. The final Master Template review involves our technical team conducting a comprehensive review of all system configurations, data mappings, and integrations to ensure everything is properly set up for production use.

Your team will review and sign off that your data has been accurately migrated. You'll also complete final user testing and provide sign-off confirmation that your system is ready for live operations. Once all items are validated and approved, we'll confirm the go-live date and finalize the cutover timeline with your team.

**Reminder:** Don't forget to coordinate and communicate internally with your team about go-live timing and expectations.

### Go-Live & Transition

On go-live day, our technical team executes the go-live data conversion, which involves the final transfer of any remaining data, activation of live system connections, and switching from test to production environment.

Immediately following the conversion, your team's key users should test your system and gather feedback. Please verify that all systems are functioning correctly, data has been transferred properly, and users can successfully access and navigate the new software.

In the first week after go-live, please monitor your daily operations and report any technical issues by submitting a case through Bold Group's [support portal](#). Your project manager will conduct a post-go-live call to review any outstanding issues and provide support before your formal project completion and transition to support.

### Customer Responsibilities:

The following tasks are required to complete the go-live phase of your implementation:

- Complete final Master Templates
- Provide sign-off confirmation on data
- Complete go-live checklist
- Complete final user testing and provide sign-off confirmation
- Coordinate internal communication about go-live timing and expectations

- Ensure key users are available during go-live day for immediate testing
- Participate in post-go-live review and provide feedback on system performance
- Monitor daily operations in the first week and report any issues promptly

## **Bold Group Deliverables:**

During the go-live phase of your implementation, Bold Group will provide the following deliverables:

- Go-live data conversion
- Initial KPI tracking and support plan initiated
- Conducts immediate post-go-live review
- Executed data migration with all historical and master data properly transferred
- Go-live checklist verification confirming all technical requirements are met
- Post-go-live system validation ensuring proper functionality across all modules
- Initial KPI baseline establishment for ongoing performance monitoring
- Immediate support availability during go-live day and transition period

## **Key Milestones**

The following milestones must be met to complete the go-live phase of your implementation:

- Final Data Sign-off - Customer approval of all migrated data accuracy and completeness
- Go-Live Checklist Completion - All technical and business requirements validated and approved
- Go-Live Date Confirmation - Official commitment to cutover timeline and responsibilities
- Production System Activation - Live environment enabled and fully operational
- Post-Go-Live Validation - System functionality confirmed and initial performance metrics established
- Support Transition Initiation - Handoff from implementation to ongoing support team begins

## **— COMPLETION & SUPPORT HANDOFF**

Congratulations! You've successfully completed the final phase of your implementation and are now live on SedonaOffice. This transition marks an important milestone—you've moved from being an implementation customer to becoming a fully operational user of the system.

As your implementation project comes to a close, it's time to transition from the project management support you've received during implementation to the ongoing support structure and resources that will serve your long-term needs and help you maximize your software investment over time.

During this handoff period, we'll ensure you understand how to access technical support when you need it, and the resources available to help you have continued success. This marks the last phase of your implementation and typically takes place 30 days after your go-live.

With the go-live of SedonaOffice complete, your project manager will conduct a project closure call to formally transition your organization to our Technical Support teams. This transition is important to ensure continued support for any remaining open items from go-live and to ensure that customer end users are supported on an ongoing basis with your SedonaOffice software.

**Important Note:** After your transition to support, when your system is fully implemented and functional, the fastest way to get help resolving an error or technical issue is to open a case in Bold Group's [support portal](#). Your project manager will no longer be your contact for getting help with your SedonaOffice system.

For more information about how to get help from Bold Group's technical support team, please view the next chapter "Getting Help after Go-Live."

### **Customer Responsibilities:**

- Understand how to contact Bold Group's technical support team
- Understand process for submitting a support case through the Bold Group support portal and what supporting information and documentation is needed
- Understand what is covered under your support and maintenance plan

### **Bold Group Deliverables:**

- Project manager sends a formal project completion notification
- Project manager provides instructions and resources for how to access ongoing technical support

## 4. GETTING HELP AFTER GO-LIVE

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Bold Group offers a wealth of resources to ensure you have success using your SedonaOffice software. Visit the [support page](#) on Bold Group's website for more information about support resources and answers to frequently asked questions about those resources.

### — TECHNICAL SUPPORT

Bold Group's technical support team is here to provide assistance if you encounter an error or technical issue that is disrupting your system's operation.

#### Requesting Technical Support




Request help from our technical support team by opening a ticket in Bold Group's [support portal](#) or by calling (719) 593-2829 or (800) 255-BOLD.

Bold Group's **standard support hours** for SedonaOffice are Monday-Friday, 8:00AM ET to 6:00PM ET. After hours support is available by appointment only.

#### Bold Group Support Portal

Bold Group's [support portal](#) is the fastest way to get help from our technical support team and track the status of open cases. When submitting a support case, please provide detailed information about your system and the issue you're experiencing, including screenshots if possible. The comprehensive details you provide help us route your case to the correct specialist and get your issue resolved faster. We are committed to resolving your issue as quickly as possible to minimize disruptions to your business operations.

Learn more about using the Bold Group support portal:

-  [Request Technical Help through the Support Portal](#)
-  [Creating an Account in the Support Portal](#)
-  [Customer Portal Instructions](#)

#### Support & Maintenance Plan

The key benefits and services you receive for your support and maintenance plan are:

- Resolution of technical issues encountered in a fully implemented and functional system. This is typically defined as break-fix and emergency support.
- Access to product updates and upgrades
- Access to online customer support portal
- Unlimited support requests

The following are not covered or out of scope under your support and maintenance plan:

- Infrastructure maintenance and upgrades (networking, server hardware, OS, 3rd party components)
- Reconfiguration or reinstallation of any Bold Group software solution

- Software customizations
- Installation, configuration or troubleshooting requests relating to a third-party product

If your request falls outside of the scope of your support and maintenance plan, please reach out to your Account Executive as we may be able to provide a solution on a project basis. Bold Group's sales team will initiate the scoping and quoting process for your project.

## — GETTING ANSWERS IN THE KNOWLEDGE BASE

The SedonaOffice knowledge base is a self-service online library of resources that contains setup and user guides, eLearning, tutorials, product documentation and release notes, and articles that address common questions from users. Whether you're new to the software or a seasoned user, the SedonaOffice knowledge base is your go-to resource for getting immediate answers to your SedonaOffice questions and getting the most value from your software.

### Accessing the Knowledge Base

The SedonaOffice Knowledge Base is an external resource and is **not** accessed through the SedonaOffice application. Instead, it is hosted online and can be reached directly through the link below.

The Knowledge Base contains setup guides, how-to articles, training resources, and documentation to support your team throughout onboarding and daily system use.



#### SedonaOffice Knowledge Base:

<https://sedonaoffice.knowledgeowl.com/help>

We recommend bookmarking this link for quick access and sharing it with all team members who will be working in SedonaOffice.

## — ADDITIONAL SUPPORT & LEARNING RESOURCES

### Status Page

The Bold Group status page is a support tool that allows you to see the status of the SedonaOffice application in real-time, including scheduled maintenance and downtime.

Please bookmark the Bold Group [status page](#) and subscribe to receive SMS or email alerts about incidents and maintenance.

### BoldU

The [BoldU Learning Portal](#) is Bold Group's online learning management system, where you can enroll in self-directed eLearning courses and browse training guides and more resources.

To request access to the [BoldU Learning Portal](#) please contact [boldU@boldgroup.com](mailto:boldU@boldgroup.com). Please include the following information in your request:

Company Name:

Person to be Learner Manager:

Learner Manager email:

Product:

## Webinars

Bold Group hosts frequent customer webinars covering a variety of training topics plus highlighting product integrations. Browse upcoming and on-demand webinars on the [webinars page](#) of the Bold Group website.

## — PRODUCT RELEASES

We release frequent SedonaOffice product updates to provide continuous improvement to your system, and rollout of these updates takes place in the evening to minimize disruption of your operations. Once available, the release notes can be found in the [Release Notes](#) section of the SedonaOffice knowledge base.

## — APPLICATION & TECHNICAL CONSULTING

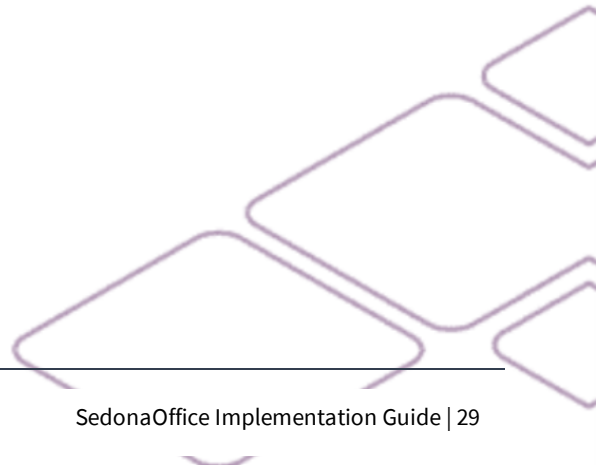
We offer a variety of application and technical consulting services to help your organization optimize results and meet business objectives using your SedonaOffice software. Our goal is to partner with you to find solutions so you can get the most value of your software.

Please contact your account rep or [boldsales@boldgroup.com](mailto:boldsales@boldgroup.com) to inquire about consulting services.

## — BILLING FOR YOUR SEDONAOFFICE ACCOUNT

If you have billing questions or need help with an invoice, please contact the SedonaOffice billing team at [Perennial\\_AR@boldgroup.com](mailto:Perennial_AR@boldgroup.com) or open a support case in the Bold Group [Support Portal](#).

Please note that Bold Group's customer billing and Accounts Receivable is handled by our parent company, EverCommerce. If you receive billing communications from EverCommerce team members using the [@evercommerce.com](#) email domain, please know that these are legitimate and authorized by Bold Group.



## 5. APPENDIX

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### — FREQUENTLY ASKED QUESTIONS

#### **Who do I contact if I need further assistance during the implementation process?**

During implementation your project manager (PM) will be your primary point of contact. Any communication with other Bold Group departments during your implementation should be provided back to your PM. Your Account Executive will join your weekly implementation calls, and your project executive support is available for project escalations.

#### **How long does implementation take?**

This is the question we receive most frequently and it's also the most difficult to answer as each implementation is unique. The implementation duration varies based on factors such as quality of data provided, how quickly an organization completes self-guided training, and the timeliness of response to questions. Your project manager can provide an estimated timeline based on your organization's specific needs and data complexity.

#### **How can I avoid delays in my implementation?**

To help ensure your implementation stays on track, here are the key areas where your active involvement keeps your implementation moving forward:

- Quick responses to questions and requests
- Completing your data staging spreadsheet promptly
- Completing the self-guided training modules by the dates requested
- Practicing your workflows in your SedonaOffice environment to understand how the application supports your business processes

Your engagement in these areas directly impacts your go-live timeline and overall success. Our implementation team is here to support you every step of the way. Please reach out to your project manager to discuss how your organization can stay on track throughout your implementation.

#### **Who from my organization should be involved in implementation?**

Please refer to the chart under Key Roles & Responsibilities in the Introduction to this guide which outlines who from your organization should be involved in your implementation.

#### **Can I upload my data myself?**

Yes. This is often recommended for smaller organizations. Entering your own data also allows you to learn the structure of the application and understand how your data maps to the fields in SedonaOffice.

#### **What will be covered in 1:1 training?**

1:1 virtual training is purchased as part of your implementation package. These sessions take place after completing your self-guided training and are tailored to meet the specific needs of your organization. Below are key areas typically covered during training:

- Setup Preferences - Customize and set up your company's unique database with our help.
- Application Training - Learn to use SedonaOffice for daily business operations.
- First Recurring Cycle - Our trainer assists in running your first recurring cycle with SedonaOffice.

Please refer to the Validation & Training section of this guide for more information about 1:1 training.

### **How are we updated on new releases?**

We release frequent SedonaOffice product updates to provide continuous improvement to your system. You can find release notes for the latest SedonaOffice product releases by visiting the [Release Notes](#) section of the SedonaOffice knowledge base.

### **When are system updates and maintenance scheduled?**

We schedule maintenance during off-peak hours and notify users in advance through Bold Group's [status page](#). Updates are automatically applied to ensure you always have access to the latest features and improvements.

The status page is a support tool that allows you to see the status of the SedonaOffice application in real-time, including scheduled maintenance and downtime. Please bookmark <https://status.boldgroup.com> and subscribe to receive alerts straight to your inbox.

### **I need help with an invoice or have a billing question.**

Contact the SedonaOffice billing team at [Perennial\\_AR@boldgroup.com](mailto:Perennial_AR@boldgroup.com) or open a support case in the Bold Group [Support Portal](#). Please note that Bold Group's customer billing and Accounts Receivable is handled by our parent company, EverCommerce. Billing communications you receive from the [@evercommerce.com](#) domain are legitimate and authorized by Bold Group.

### **What is EverCommerce and how is it connected to Bold Group?**

EverCommerce (Nasdaq: EVCN), a leading service commerce platform serving more than 725,000 global service-based businesses, is Bold Group's parent company. Bold Group has been part of EverCommerce since 2018.

### **How can I pay my first invoice?**

Online payment by credit card or ACH through SedonaOffice's [billing portal](#) (powered by Managely) is the fastest, most secure way to pay your bill. [Follow these instructions](#) to create your account, set up payment methods, and pay your invoice for one-time fees.

To pay by check or wire, please reach out to SedonaOffice's billing team at [Perennial\\_AR@boldgroup.com](mailto:Perennial_AR@boldgroup.com) for instructions.

### **When does monthly recurring billing start for my SedonaOffice account?**

Typically, monthly recurring billing starts 6 months after signing your Order Acknowledgement form or 30 days after your User Acceptance Starts, whichever occurs first. However, please refer to your Order Acknowledgement for the specific terms of your agreement.

### **What is PaySimple and how is it related to CSG Forte for payment processing?**

PaySimple is the payments division of Bold Group's parent company, EverCommerce. PaySimple works directly with CSG Forte to support Bold Group customers. This is why a PaySimple representative will reach out to you initially if you plan to use the Forte integration. However, you will work directly with Forte to submit your application, set up your account, and manage PCI compliance.

### How do I add more users or upgrade my plan?

You can add more users or change your subscription plan by reaching out to your Account Executive. If you're not sure who your rep is, please email [boldsales@boldgroup.com](mailto:boldsales@boldgroup.com).

## — QUICK LINKS



Bold Group Support Portal – <https://support.boldgroup.com>



SedonaOffice Knowledge Base – <https://SedonaOffice.knowledgeowl.com/help>



Bold Group Status Page – <https://status.boldgroup.com>



BoldU Learning Portal – <https://learn.boldgroup.com>



SedonaOffice Billing Portal – <https://sobilling.SedonaOfficeapp.com>

## — CONTACT US

- **Sales:** [boldsales@boldgroup.com](mailto:boldsales@boldgroup.com)
- **Billing** [Perennial\\_AR@boldgroup.com](mailto:Perennial_AR@boldgroup.com)
- **Support** (719) 593-2829 or (800) 255-BOLD or <https://support.boldgroup.com>

