IMPLEMENTATION GUIDE FOR MANAGELY

BOLD GROUP

MANAGELY™

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1. INTRODUCTION

— WELCOME

Thank you for choosing Managely as your business management solution—Bold Group is honored to partner with your organization. We understand that proper installation and implementation of Managely 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 Managely 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 Managely solution and provides information about data migration and mapping, training on your software, resources, as well implementation FAQs.

Managely 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.

Managely 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 Managely.

— KEY ROLES & RESPONSIBILITIES

Your first experience as a Managely 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 Managely.

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

— **Technical Support**	Helps resolve errors or technical issues disrupting fully implemented and functional systems. Provides support for software updates.

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
Implementation Lead	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.
Data Mapping Owner	Sources, organizes, and maps data and ensures accuracy of data before upload. Knowledge of Excel is highly recommended.
Accounts Receivable, Accounts Payable & Accounting	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
User Trainer	Champions system adoption, trains system users and serves as your primary internal resource for ongoing user questions and support after go-live.
Field Service Technician Manager/Representative	Manages and train field service team in deploying Managely.
User Administrator	Administers users, sets up permissions and grants access to Managely users.

— 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 Managely 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 Managely 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 an 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.

— Managely's online billing portal is the most secure way to pay your bill. Follow these instructions to create your account, set up payments methods, and pay your invoice for one-time fees.

Important Note: We cannot begin your Managely 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 Managely AR/billing team at Perennial_AR@boldgroup.com.

— REVIEW E-LEARNING & SETUP GUIDES

A successful implementation starts with a solid understanding of how Managely 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.

Please take time to familiarize yourself with the system's features, navigation, and standard business processes before your kickoff call with your project manager. 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 Managely software.

Start with Required eLearning:

Required Managely e-Learning: Getting Started in Managely

Learning Objectives:

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

Review Guides to Completing Setup Tables:

Your Managely 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 begin completing these setup tables on your own. During 1:1 training, your Application Consultant will review the most important tables, check your setup, and answer questions specific to your business.

Review Setup Table Guides: [Managely Setup Table Guides]

More Resources for Setting Up Your System:

Key lessons to help you set up and use Managely:

- Preference Setup
- System Defaults
- Add a User
- User Manager Permissions and Configuration

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 MANAGELY

Your project manager will provide you with your unique login information during your kickoff call. Please bookmark your company page to easily access Managely in the future.

Unique company Managely URL: ________________________________

Login Help & Resources:

- Logging into Managely and Resetting Password
- Adding Users from Your Company
- Login FAQs

— SETTING UP FORTE FOR PAYMENT PROCESSING

CSG Forte is Bold Group's exclusive partner for payment processing and is fully integrated with the Managely 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 setup and does not delay your Managely go-live date.

Important Forte Billing Note: Forte billing begins upon application approval and is not tied to your Managely 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 Managely.

— 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 MANAGELY BILLING BEGINS

Your monthly recurring billing for Managely 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

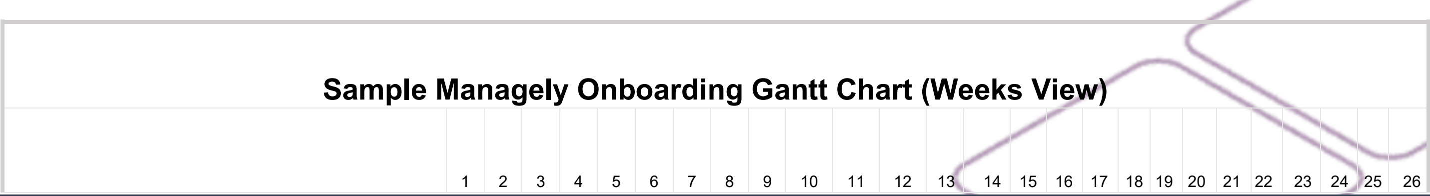
— IMPLEMENTATION PHASES

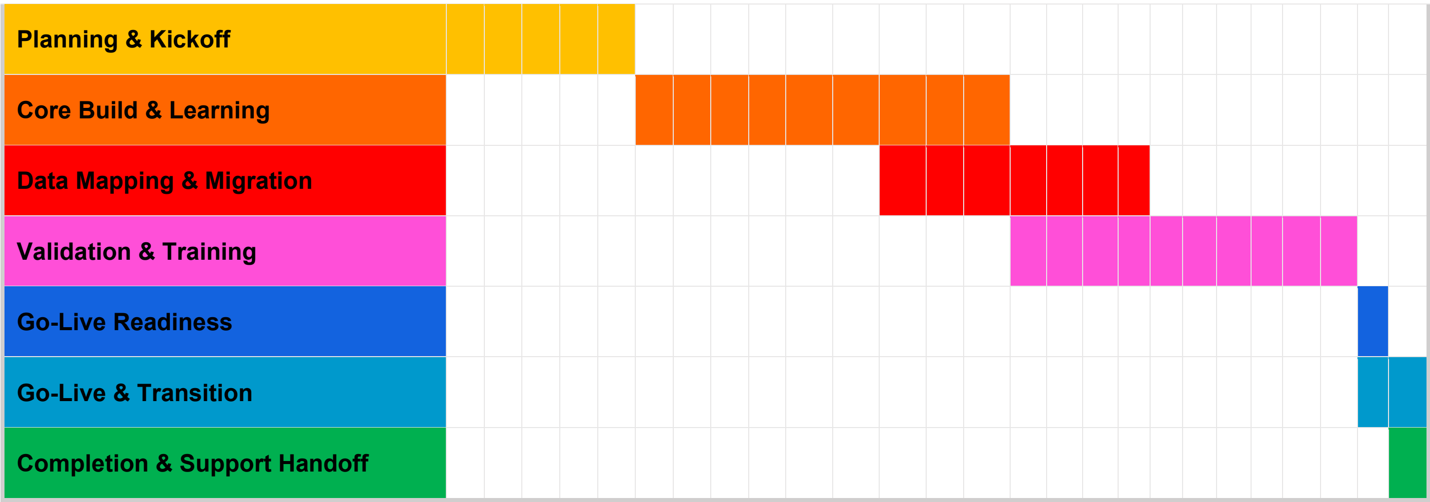
The chart below outlines the key phases of your implementation journey. Each phase builds upon the previous one and is designed to deliver specific value while moving you closer to go-live. While this chart provides a high-level view of the process, your project manager will walk you through the detailed 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 date. Your project manager can provide better estimates for your specific situation.

PHASE	DESCRIPTION	ESTIMATED CUSTOMER EFFORT
Planning & Kickoff	Project manager assigned and kickoff call scheduled. Review project goals, timelines, and roles, and align on expectations.	1-2 hours
Core Build & Learning	System configuration and data staging begins. Customers build foundational knowledge of Managely application through BoldU and knowledge base resources.	10-15 hours
Data Mapping & Migration	Your project manager and data conversation specialist (if applicable) provides instructions and supports you in mapping your organization's data.	15-20 hours
Validation & Training	Customers replicates business processes in Managely environment. CPA consultation and 1:1 training sessions occur (if applicable).	15-20 hours
Go-Live Readiness	Final data sign-off and readiness checklist completed. Go-Live date is confirmed.	3-4 hours
Go-Live & Transition	Live data conversion completed. Project Manager ensures functionality is in place and supports immediate post-Go-Live review.	2-3 hours
Completion & Support Handoff	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 electronic data conversion from your existing system to the Managely 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 Managely 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 staging document.

During the Administrative Training and data conversion for Managely, you might find new tables not in your current system or existing tables too small for conversion, requiring manual data entry. This task can be performed alongside data conversion, with your application consultant guiding what data to input. All key details are covered in training, and you must complete the Go-Live checklist to confirm all data entry before the Go-Live date.

Understanding How Managely 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 Managely 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 Managely's data framework and workflows. This may involve some adjustments to your data and, occasionally, refining your internal processes.

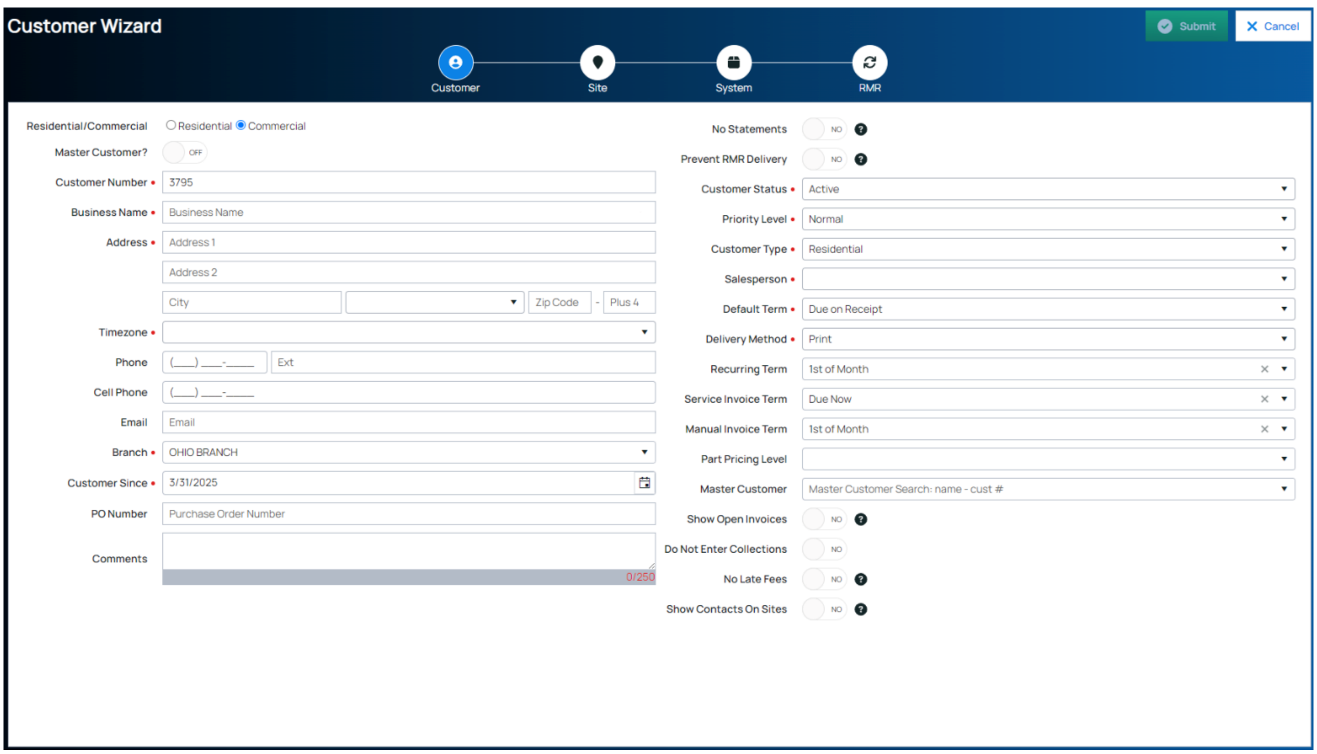
Getting this right at the outset ensures accurate configuration, smooth workflows, and successful outcomes throughout the project.

> **Tip:** We highly recommend you enter 2-5 test customers manually PRIOR to completing the staging document. This will help you learn how fields are laid out and what your data looks like in Managely. We have found that customers who take this step complete the staging document with greater ease and accuracy.

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 Managely knowledge base to learn more about adding customers through Managely's Customer Wizard.



Data Migration & Mapping Process

PHASE	DESCRIPTION	ESTIMATED EFFORT
Data Mapping	Customer obtains export of current data source and maps data into staging document; removes all incorrect data prior to mapping into staging document.	4-6 weeks
C1 Test Conversion	Completed staging document is imported into Managely . No downtime.	1 day

Data Audit	Customer audits the data imported to Managely and makes required changes **on the staging document NOT in Managely**	2 weeks
C2 Test Conversion	Additional test pass to see data changes reflected before go-live.	1 day
Go-Live Conversion	Completed staging document is imported into Managely; 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 Staging Document. This document helps translate your existing data into the format required by Managely 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 staging document. 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).

— Using placeholder email addresses during early testing, as the Managely environment is live.

Important Note: Managely is a live cloud-based environment. There is no separate sandbox or offline testing space. Any real contact information entered (such as email addresses) can trigger live communications, including emails to customers. Please use caution when entering data during training and testing activities.

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 staging document

- Exploring the setup tables in your database and review the staging document to understand what data elements can be brought in, and which cannot
- Enter data into staging document
- 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:

- Staging document 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:

- Staging document is completed (typically within 4-6 weeks)
- Test conversions C1 and C2 are executed (typically within 4-8 weeks)
- 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
- Staging document finalized and signed off on
- Managely environment populated with test data

— VALIDATION & TRAINING

Your Managely 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 completely self-guided training in a timely manner, which is a prerequisite to scheduled your organization-specific 1:1 training sessions with your application consultant.

Training & Learning Modules:

MODULES	DESCRIPTION	ESTIMATED EFFORT
Self-Guided Learning	Customer completes self-guided training in the BoldU learning management system and reviews relevant content in the Managely knowledge base, using Managely to replicates daily processes (e.g., RMR setup, invoicing workflows) as your learn.	10-15 hours
CPA Consultation (if applicable)	CPA supports: • Chart of Accounts design & validation • Standard vs. Average costing strategy • Tax configuration and reporting setup	2+ hours
Application Consultant Training	1:1 training and Q&A sessions tailored to customer-specific needs and processes. Prerequisite: customer completes all required self-guided learning and sandbox practice prior to booking training sessions are booked.	15-20 hours

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
BoldU Coursework	Managely User Courses Managely Setup Courses	BoldU Learning Platform
Managely: Getting Started	Understand Managely navigation and layout	Getting Started in Managely

Add Customer, Site, System	Ability to create customer, site, and system records	Add a Customer Add a Site Add a System
Setup Tables	Review complete setup table guides	Managely Setup Table Guides

Administrative Setup Training

Mastering the basics of Managely is essential for effective implementation. System Administrators and key decision-makers should attend the training session with your Application Consultant to learn about the database, setup tables, and preferences.

Your Application Consultant will detail each element's functionality with examples relevant to your business. This training session takes 2-3 hours and equips you and your staff to enter data, continue with application training, and achieve successful implementation.

Module	Topic
Company	• User Manager and Employees • Company Info and Preferences • Cancellations • Systems Defaults
Accounting	• Accounting Periods • Sales Tax • Chart of Accounts • Branches • Categories • Aging Buckets and Statements
Operations	• Work Order Configuration • Work Order Tasks • Service Levels and Warranty • Contracts • Credit Approvals • Expenses
Items and Parts	• Item and Part Configuration • Part Kits • Pricing Levels • Part Types and Manufacturers
Utilities, Uploaders and Exports	• eCheck / Credit Card Setup • Automation CC/ACH, Statements • Managing System Locks • Customer System Templates (Invoices, Credit, Statement, WO) • Batch Uploaders
Proposals (Not required if utilizing WeSuite)	• Entering Vendors • Entering Bills • Selecting Bills for Payment • Printing A/P Checks

	• Recurring Bills & Checks • Check Stock • Purchase Orders
Other	• Exports • Task Management • Customer, System, Document Types • RMR Grouping
eForms	• eForms Template • PDF Back Back vs. WYSWIG Setup • Proposal Templates

Application Training

Our 1:1 application training is designed to provide personalized assistance tailored to your specific needs. This training includes dedicated sessions to help you customize and set up your company's database, hands-on training to familiarize you with the software's daily operations, and a guided walkthrough to successfully complete your first recurring cycle. This training is important for users working with managing customers in the system, work orders, A/R, A/P, Inventory, GL, and more.

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.

To get the most value from your personalized training time, it's essential to complete the Managely 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
Customer Management	• New Customer Creation • Manage Customer Info: Customer, Site, System, Contacts, Bill Tos, Credit Card/ACH, RMR • Cancellations • Master Account Management	2 hours
Accounts Receivable	• Recurring Billing and Payment Processing • Miscellaneous Invoices • Payments • Credits • Statements • Email, Mail, Printing Invoices • Unapplied Cash & Credits • Collections	3 hours
Inventory (if using module)	• Inventory Part Creation • Parts Explorer Functions • Warehouses • Issues and Returns • Physicals	2 hours

	• RMA • Part Kits	
Work Orders	• Work Order Queue and general ticket navigation • Creating a Ticket (Service, Recurring, Installs, etc.) • Printing Service Tickets • Schedule a Technician • Technician Dispatching • Invoicing and Deposit Options • Resolution, Invoice, and Closing Ticket • Recurring Ticket Generation • Appointment Based Recurring Tickets • Change Orders • WO Pos • Receiving Parts • Task Management	3 hours
Accounts Payable	• Entering Vendors • Entering Bills • Selecting Bills for Payment • Printing A/P Checks • Recurring Bills & Checks • Check Stock • Purchase Orders	3 hours
General Ledger (optional)	• Accounting Periods • Account Register • Journal Entries • Deferred Income Recognition • Closing Accounting Period	1 hour
Proposals and eForms (Not applicable if using WeSuite integration)	• Proposal Creation and Queue Management • Charges Tab • eForms customer proposal template • eForms Template PDF Overlay • Proposal creation and eForm delivery lifecycle • Converting Proposal to Work Order	2 hours

Sedona-X Mobile App Training (per session)	• General Navigation
	• **Customer**
	  ○ Searching, viewing, calling customers, accepting payments
	• Processing Go-Back and Resolved tickets
	• **Service Tickets**
	  ○ Searching
	  ○ Appointments
	  ○ Adding/editing/resolving
	  ○ Customer Signature
	• Scheduling Inspection Tickets and impact on Sedona-X Mobile App
	• Scheduling Jobs and impact on Sedona-X Mobile App
	• Inventory Setup and impact on Sedona-X Mobile App
	• Calendar
		2 hours per session

Migration from Bold Group Legacy Software

If you are upgrading to Managely 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.

To help with your data mapping and migration, we have created a [data audit checklist] specific to moving to Managely from a legacy system. Your project manager will review this checklist and confirm that all tasks have been completed:

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 Managely. The goal of the UAT is for the customer to navigate through each module of Managely, 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 Managely in the lifecycle of a customer, using your data to ensure all necessary processes 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 Managely environment prior to Go-Live
- Setup table training
- Completed staging documentation
- 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 Managely 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 staging document 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 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 staging documents
- 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 Managely. 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 Managely 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 Managely 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 Managely 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

Bold Group offers a wealth of resources to ensure you have success using your Managely 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 Managely 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.

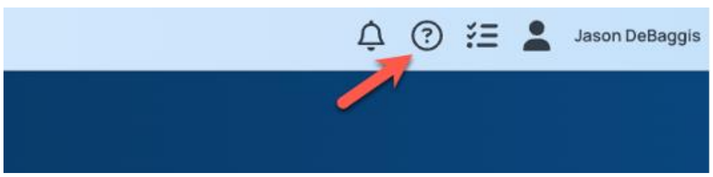
— GETTING ANSWERS IN THE KNOWLEDGE BASE

The Managely 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 Managely knowledge base is your go-to resource for getting immediate answers to your Managely questions and getting the most value from your software.

Accessing the Knowledge Base

Access the Managely knowledge base through Managely's in-app help located in the top right corner of the application or by using the link below.

Managely Knowledge Base



Key Resources in the Knowledge Base

Browse key resources and some of the most popular sections from the Managely knowledge base:

— Managely Quick Start Guides: an exhaustive list resources to help you set up and use Managely.
— Managely User eLearning Courses: eLearning designed for everyday users who will not be involved in application setup or admin.
— Managely Accounts Receivable Resources: understand the features and functionality of the most frequently used module in Managely.

— ADDITIONAL SUPPORT & LEARNING RESOURCES

Status Page

The Bold Group status page is a support tool that allows you to see the status of the Managely 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. 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 Managely product updates to provide continuous improvement to your system, and rollout of these updates takes place in the evening to minimize disruption your operations. Once available, the release notes can be found in the Release Notes section of the Managely 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 Managely 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 to inquire about consulting services.

— BILLING FOR YOUR MANAGELY ACCOUNT

If you have billing questions or need help with an invoice, please contact the Managely billing team at 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

— 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 Managely 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 Managely.

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 Managely for daily business operations.
- First Recurring Cycle - Our trainer assists in running your first recurring cycle with Managely.

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 Managely product updates to provide continuous improvement to your system. You can find release notes for the latest Managely product releases by visiting the Release Notes section of the Managely 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 Managely 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 questions.

Contact the Managely billing team at 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: EVCM), 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 Managely's billing portal is the fastest, most secure way to pay your bill. Follow these instructions to create your account, set up payments methods, and pay your invoice for one-time fees.

To pay by check or wire, please reach out to Managely's billing team at Perennial_AR@boldgroup.com for instructions.

When does monthly recurring billing start for my Managely 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.

— QUICK LINKS

- Bold Group Support Portal – https://support.boldgroup.com
- Managely Knowledge Base – https://managely.knowledgeowl.com/help
- Bold Group Status Page – https://status.boldgroup.com
- BoldU Learning Portal – https://learn.boldgroup.com
- Managely Billing Portal – https://sobilling.managelyapp.com

— CONTACT US

- **Sales:** boldsales@boldgroup.com
- **Billing** Perennial_AR@boldgroup.com
- **Support** (719) 593-2829 or (800) 255-BOLD or https://support.boldgroup.com