



# IMPLEMENTATION GUIDE FOR **MANITOU**

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# 1. INTRODUCTION

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## — WELCOME

Thank you for choosing Bold Group and our flagship alarm monitoring solution, Manitou. Designed to be a centralized hub, Manitou empowers your operators with real-time visibility into intrusion sensors, fire alarms, motion detection, and video surveillance—all within a single, web-based interface. Its intuitive dashboards and smart Action Patterns streamline alarm workflow and reduce handling times, enabling your team to respond faster and more accurately. Manitou offers flexible accessibility and redundancy while meeting UL and ULC compliance requirements.

## — ABOUT THIS GUIDE

This guide is for Manitou customers and outlines the implementation phases, project team roles, technical requirements, training, go-live process, and support resources. It was created with your experience in mind—to empower your internal teams with the structure, clarity, and confidence needed to implement Manitou successfully.

Throughout the guide, you'll find actionable steps, expert tips, and tools that prepare your team to take full ownership of the platform. Whether this is your first implementation or one of many, this guide serves as a roadmap to ensure you're aligned, prepared, and supported by the Bold Group team at every phase.

We encourage you to reference this document often and share it with your project stakeholders—it's not just a manual; it's your partner in achieving long-term success with Manitou.

Manitou 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 Manitou.

**Important Note:** While Manitou can be deployed either on-premises or via Manitou Cloud Services, the onboarding guide is specifically intended for customers using the on-premises version. A separate onboarding guide is available for customers implementing the cloud-hosted version of Manitou.

## — WHY MANITOU: A PLATFORM YOU CAN TRUST

You've made a smart decision in choosing Manitou, and we want to reaffirm that choice by sharing what makes Manitou stand out in the alarm monitoring software landscape. As you begin implementation, we encourage you to fully engage in the process—because the more you put into it, the more you'll get out of it.

Below are five reasons why Manitou is the platform of choice for industry leaders—and why you can feel confident moving forward.

- **Centralized & Unified Platform**

Manitou provides a true all-in-one alarm monitoring interface—combining intrusion, fire, access control, GPS, and video surveillance into a single system. This simplifies workflows and improves visibility for your operators.

- Intuitive, Operator-Friendly Interface**  
 With intuitive dashboards and Action Patterns that reduce training time, Manitou is designed for usability and fast adoption. Operators can manage complex events efficiently and with greater accuracy.
- Comprehensive Video Integration**  
 Manitou's built-in Video Control Center (VCC) gives you seamless access to video playback, PTZ control, and alarm-linked views—helping your team verify alarms quickly and reduce false dispatches.
- Robust Automations & Reporting**  
 From real-time dashboards to customizable reporting tools, Manitou delivers meaningful insights right out of the box. Built-in automation workflows ensure alarms are handled consistently and efficiently.
- Proven Support & Industry Reputation**  
 With top customer ratings and a dedicated team behind your implementation, Manitou offers you more than just software—it's a full-service partnership focused on your long-term success.

## — KEY ROLES & RESPONSIBILITIES

Your first experience as a Manitou 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 Manitou.

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 organization needs.
<b>Professional Services Department</b>	
— <b>Project Manager (PM)</b>	Your main point of contact. Coordinates milestones, meetings, and resources; escalates issues.
— <b>Trainer</b>	Guides eLearning, virtual and on-site training; prepares your team for daily operations in Manitou.
— <b>Data Conversion Specialist (Optional)</b>	Supports and executes data migration from your legacy system into Manitou.
— <b>Director of Professional Services</b>	Escalation contact and implementation resource if integration or coordination issues arise.
<b>Technical Support Department</b>	
— <b>Technical Support</b>	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. It's important that anyone who eventually owns these responsibilities long-term be involved in the implementation process.

CUSTOMER ROLE/FUNCTION	ROLE RESPONSIBILITIES

<b>Implementation Lead</b>	Oversees internal team and communicates with Bold Group; ensures tasks are completed.
<b>System Administrator</b>	Assists with server/hardware setup, networking, and configuration.
<b>Data Review Specialist</b>	Works with Bold Group to scrub, validate, and review data for migration.
<b>Subject Matter Expert (SME)</b>	Learns the system deeply and trains others on your team.
<b>On-Site Contact</b>	Supports remote technicians during installation and testing.

## — ENSURING A SUCCESSFUL IMPLEMENTATION

Every implementation is unique, but many organizations encounter similar challenges along the way. Learning from others' experiences can help you avoid delays, reduce risk, and get the most value from your investment in Manitou. Below are some of the most common pitfalls we've observed—and the proven best practices that help ensure a smooth implementation.

### Common Pitfalls to Avoid

- **Inadequate Preparation of Data for Conversion**  
Failing to clean, validate, and organize your data before submitting the staging document can lead to errors, delays, and extra rework.
- **Limited Participation in Self-Guided Training**  
Skipping or rushing through training modules results in knowledge gaps, slower adoption, and an overwhelmed team at go-live.
- **Underestimating Internal Resource Requirements**  
Assigning a single person to manage all implementation tasks can lead to bottlenecks and miscommunication. Implementation is a team effort.
- **Delaying Hardware Readiness**  
Hardware procurement or configuration delays are one of the most common reasons projects miss their target start date.
- **Testing Too Late**  
Waiting until go-live to fully explore Manitou can result in last-minute surprises. Use the parallel environment to test early and often.

### Best Practices for a Successful Implementation

- **Start Training Early and Track Progress**  
Assign training modules by role and ensure each team member is making weekly progress. Leverage your Project Manager for accountability.
- **Clean and Validate Your Data Thoroughly**  
Take time to scrub old records, standardize formats, and remove duplicates before data conversion. The quality of your data impacts everything downstream.
- **Designate Internal Subject Matter Experts (SMEs)**  
Identify key users who can be trained early and help guide the rest of your team. These SMEs are crucial to long-term success and in-house support.

- **Use the Sandbox Environment Proactively**

Practice real-life workflows using test alarms in your parallel environment. Confirm that your team understands how to navigate and resolve events in Manitou.

- **Stay Engaged and Communicate Frequently**

Attend weekly check-ins, ask questions, and share roadblocks early. A proactive customer team is one of the strongest predictors of a successful go live.

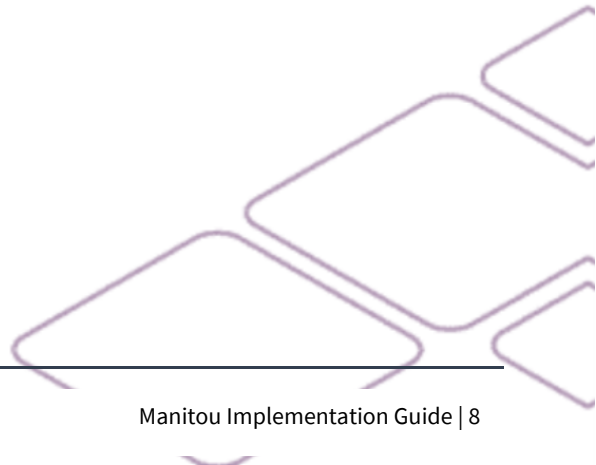
**Remember:** Bold Group is here to guide and support you throughout the entire implementation journey. Your success with Manitou depends not only on our expertise—but also on your team’s engagement, preparation, and commitment to the process.

## — OUR PROMISE

Implementing Manitou is a significant investment, and Bold Group is committed to your success every step of the way. Our experienced team will guide you through every milestone of your onboarding journey, offering proactive support and clear communication throughout the process. We’re not just here to install software—we’re here to help your organization optimize operations, enhance alarm response, and deliver exceptional service to your end users.

**Your success is our success, and we take that partnership seriously.**

You’ll have dedicated professionals in helping you launch strong and build confidence using Manitou from day one.





## 2. GETTING STARTED

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### — PAY YOUR ONE-TIME FEE

To officially launch your Manitou implementation, Bold Group must receive confirmation of your project's one-time implementation fee payment. Within a week of signing your Sales Agreement, your organization's designated billing contact will receive an email notification with the invoice to pay your one-time fees. If you do not receive the invoice within this time frame, please reach out to our Accounting team directly using the contact information below.

- Manitou's [online payment form](#) is the most secure way to make payments to Bold Group on your Manitou account. [Follow these instructions](#) to pay your invoice for one-time fees.

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

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

### — 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 review and preparation, setting up or supporting your system, or training your staff should attend this meeting. Please review Customer Key Roles on pg. 4 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

### — PREPARING FOR IMPLEMENTATION

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## 3 Things to Do Right Now

1. **Pay your invoice** to officially launch your onboarding
2. **Assign key internal roles** (Implementation Lead, Data Lead, etc.)
3. **Familiarize your team with this guide** and the training timeline

## Top Customer Responsibilities During Implementation

- Prepare clean and validated data for import
- Complete all required self-guided training before live sessions ([Manitou knowledge base](#))
- Ensure server/hardware readiness per system specs ([Minimum System Recommendations](#))
- Attend scheduled meetings and stay engaged throughout the process

## Go-Live Readiness

You'll complete a Go-Live Readiness Checklist before final cutover to ensure:

- Hardware is installed and accessible
- Signal traffic is tested
- Training is complete
- Data has passed C1 and C2 test conversions
- Internal SMEs are prepared to support your users

For questions or support at this stage reach out to your **Project Manager** at any time.

## — REVIEW E-LEARNING & SETUP GUIDES

A successful implementation starts with a solid understanding of how Manitou 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 Manitou software.

## Start with Required eLearning:

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

Learning Objectives:

- Understand how to use the tools in Manitou 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 Manitou 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: [Manitou Setup Table Guides](#)

## More Resources for Setting Up Your System:



Key lessons to help you set up and use Manitou:

- [Preference Setup](#)
- [System Defaults](#)
- [Add a User](#)
- [User Manager Permissions and Configuration](#)

## — LOGGING INTO MANITOU



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

Unique company Manitou URL: \_\_\_\_\_

## Login Help & Resources:

- [Logging into Manitou and Resetting Password](#)
- [Adding Users from Your Company](#)
- [Login FAQs](#)

## — WHEN YOUR MANITOU BILLING BEGINS

Your monthly recurring billing for Manitou 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 implementation of Manitou On-Prem is structured into seven key phases. While timelines can vary based on your team's readiness, resource availability, and data complexity, the table below outlines a typical implementation schedule to help you plan accordingly.

PHASE	DESCRIPTION	DURATION
<b>Phase 1: Kickoff &amp; Planning</b>	Introductions, scope review, team alignment, and checklist distribution	1–2 weeks
<b>Phase 2: Hardware &amp; Server Prep</b>	Hardware procurement, network configuration, system readiness confirmation	1–4 weeks (customer-led)
<b>Phase 3: Manitou Installation</b>	Remote installation of Manitou software, licensing setup, and signal testing	1–2 days
<b>Phase 4: Training</b>	Self-paced eLearning followed by live Application Consultant-led training	3–4 weeks
<b>Phase 5: Data Conversion &amp; Testing</b>	Data exports, staging file prep, test conversions (C1, C2), validation	2–4 weeks (often concurrent with training)
<b>Phase 6: Go-Live</b>	Final conversion, user validation, production system cutover	1–3 days
<b>Phase 7: Support &amp; Long-Term Success</b>	Transition to Support, review resources, and ongoing CSM engagement	Begins immediately post-go-live

**Note:** Some phases run in parallel (e.g., training and data prep). Delays in customer tasks (hardware readiness, training completion, data review) are the most common reason for project extensions.

### — PHASE 1: KICKOFF & PLANNING

The kickoff phase sets the tone for your entire Manitou implementation. This is where we align teams, clarify expectations, and begin laying the foundation for your successful go-live. Collaboration and communication are key during this phase, and we'll be with you every step of the way.

#### What to Expect During This Phase:

- **Project Assignment & Introduction**

Once your project payment has been received and processed by Bold Group's Accounting team, your

implementation will be routed to our Professional Services team. Project Managers assign new accounts twice weekly, and you should receive an introduction from your assigned PM within 1 business week of routing. Your PM will be your main point of contact throughout the project.

- **Meet Your Project Manager**

Your Project Manager will schedule a kickoff call to walk through the onboarding process, key milestones, and expectations. This meeting typically occurs within 1–2 weeks of assignment and is attended by both internal stakeholders and your Bold Group team.

- **Review Your Signed Proposal and System Configuration Document (SCD)**

The PM will review your signed Sales proposal and SCD to confirm the modules you’ve purchased, your system design, and specific implementation scope. This ensures all team members are aligned on what’s included—and what isn’t—so we can manage the timeline and goals effectively.

- **Identify Your Internal Project Team and Roles**

We’ll help you assign key roles within your organization, such as an Implementation Lead, System Admin, Data Contact, and Training Coordinator. These assignments are critical to keeping the project on track. We recommend defining roles and responsibilities during or immediately after the kickoff call.

- **Confirm Project Goals, Hardware Needs, and Timeline**

During this phase, we’ll confirm your ideal go-live window, review your hardware procurement plan, and set initial milestone expectations. You don’t need to have everything finalized immediately—but knowing what’s ahead will help us stay on target.

- **Complete Required Implementation Checklists**

Your Project Manager will provide a set of onboarding checklists to gather information and confirm readiness. These may include business operations details, site configuration preferences, and data conversion prep. Most checklists are digital and can be completed within 3–5 business days.

## — PHASE 2: HARDWARE & SERVER PREPARATION

Before installation can begin, your organization must have the appropriate hardware and system environment in place to support Manitou. These requirements are essential to ensure your system runs smoothly and remains stable, secure, and high-performing long term.

Most hardware and infrastructure discussions will have already occurred during your pre-sales and contracting process. However, this section serves as a **reminder** that all required components must be **procured, delivered, and configured** before Bold Group can begin implementation.

Please always refer to the latest system requirements online to ensure accuracy:

<https://manitou-knowledge-base.knowledgeowl.com/help/system-requirements>

**Important Note:** Delays in hardware procurement may delay your implementation start—and that’s okay. Our team will be ready to begin as soon as your environment is prepared. Please keep your Project Manager updated on your estimated timelines so we can coordinate accordingly.

## Minimum System Recommendations

COMPONENT	MINIMUM SPECIFICATION
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<b>Database/Application Server</b>	Intel Quad-Core CPU, 32 GB RAM, RAID-1 (2×300GB SAS for OS; 2×600GB SAS for Data), SQL Server 2022 Standard or higher
<b>Operator Workstation</b>	Dual-core CPU, 8 GB RAM, 1920×1080 resolution, sound card, dual monitors recommended if using video
<b>Operating System</b>	Windows Server 2022 (Standard or Data Center), all patches applied
<b>Storage Type</b>	SSD or enterprise-grade SAS drives recommended for optimal performance
<b>Network</b>	100/1000 NIC; ports 1433 (SQL), 7007 (Distributor), 7008 (Web Gateway) must be open
<b>SSL Certificate</b>	Required for all servers, must be issued by a trusted authority
<b>Backup Device</b>	High-speed backup device such as tape, USB, SAN/NAS, or optical media

If you have purchased the following modules, the respective server requirements also apply:

**BoldNet Server:** Quad-Core CPU, 16 GB RAM, RAID-1 (2×300GB HDDs), SQL Express 2022

**MediaGateway Server:** Quad-Core CPU, 16 GB RAM, RAID-1 (2×300GB HDDs), SQL Express 2022

If using a **Digi PortServer** for receiver connections, the size depends on how many receivers you plan to use. For example, if you are using approximately two receivers, a 4-port unit is likely sufficient. You may purchase this device from vendors such as CDW, Amazon, or Newegg.com. This device is necessary during the implementation process so that you can have live signals report to both your current automation and Manitou. This will help support a smooth transition and enable your team to participate during the data review process. The best practice is to use both automations during the training process to increase learning and software adoption early in the process.

Your Tasks:

- Order and receive hardware (if not already ordered)
- Assign static IPs, install Microsoft updates
- Follow naming conventions for Manitou servers
- Complete pre-install configuration based on your SCD

**Reminder:** Installation cannot proceed until all hardware is on site, networked, and configured

## — PHASE 3: MANITOU INSTALLATION

The Manitou installation is where everything begins to take shape. During this phase, Bold Group’s technical team will install the Manitou software and supporting components remotely using GoToAssist or a secure remote access method. The standard installation process typically spans **6 to 10 hours** of technical consulting, depending on your system size and complexity.

### What to Expect During Installation:

- **Remote Installation & Configuration**

Bold Group will remotely install your licensed Manitou modules, including core services, the SQL Server database instance, and any add-on modules such as BoldNet or MediaGateway (if applicable). All work will be performed on customer-provided servers that meet the agreed-upon system requirements. We utilize GoToAssist (fastsupport.com) to get connected to your system remotely. Please ensure your environment supports this method for a smooth experience.

- **On-Site Contact Required**

You will need to have an on-site technical contact available during installation. This person should be familiar with your local network and be able to assist with physical connections, firewall updates, and troubleshooting if needed.

- **Signal Traffic Setup & Licensing Activation**

During this phase, Bold Group will configure inbound signal paths, activate your license keys, and connect your receivers and panels for test signals. This includes validating communications with PBX, IP receivers, and third-party integrations as defined in your System Configuration Document (SCD).

- **SQL Server & Application Services**

If your project includes Microsoft SQL Server installation, our team will complete that configuration as part of the install. This ensures your Manitou application database is running on a secure, optimized environment with appropriate settings for indexing, backups, and permissions.

- **System Delivery & Milestone Billing**

Upon completion of installation and core system configuration, your Project Manager will confirm “System Delivery” has been met. At this point, a milestone invoice will be generated according to your agreement.

- **Time Estimates**

Most installation efforts fall within **6 to 12 hours** of system consulting services. Additional time may be required if there are unique integrations or module-specific components, such as video, automation patterns, or third-party interfaces.

**Tip:** Ensure your servers are configured, powered on, and accessible via remote access prior to your scheduled install window. Missing prerequisites may delay this phase and affect your overall go-live timeline.

## Sandbox Environment Guidance

Before your go-live cutover, Manitou operates as a **parallel test environment**—a fully installed, configured system that runs alongside your legacy platform. During this period, both systems are live and actively receiving alarm signals, allowing your team to verify workflows, complete training, and validate data in real time.

### What to Expect During Parallel Testing:

- Manitou is fully installed and connected to your receivers.
- Your legacy platform remains active while Manitou is tested side-by-side.
- You will monitor both systems to ensure alarms appear and behave as expected.



- This is your opportunity to practice workflows, test signals, and become familiar with the Manitou interface using your own live data.

## Go-Live Cutover:

Once the testing and training period is complete—and both your internal team and the Bold Group team confirm readiness—you will perform a physical cable switch. This cutover transitions Manitou from a test system to your live production environment. From this point forward, Manitou becomes your primary monitoring platform.

## Best Practices During This Phase:

- Monitor alarms in both systems and track any inconsistencies.
- Use Manitou's System Test and Query Test features to confirm alarm handling.
- Encourage your team to log in daily and engage with core workflows.
- Complete required training modules before cutover for full team readiness.
- Document any issues and escalate them to your Project Manager or Application Consultant for review.

**Important:** The parallel test environment is a critical phase for training and validation. Once the cutover is complete, all operations should be conducted exclusively in Manitou.

## — PHASE 4: TRAINING

### Manitou Self-Guided Training Plan (Recommended)

This training plan is designed to help you build confidence using Manitou before your one-on-one sessions with Bold Group's Application Consultant. While there's no strict deadline, completing this material within four weeks ensures your team is well-prepared for implementation and can ask targeted, informed questions during training.

#### Week 1: Getting Started with Manitou

*Estimated Time: 3–4 hours*

- Start with "Your Manitou Guide: Start Here"
- Complete the "Manitou Overview eLearning"
- Watch videos on "Logging On" and "Web Client Overview"
- Tour the workspace: navigation, dashboards, and menus

**Goal:** Understand the Manitou interface, workspace layout, and how to navigate the system confidently.

#### Week 2: Core Data Entry & Customer Setup

*Estimated Time: 4–5 hours*

- Complete the full "Customer Wizard" eLearning series
- Begin the "Manitou Data Entry eLearning" module
- Learn how to enter customer details, systems, zones, and contacts



- Review data types: Dealers, Authorities, Branches, and Keyholders
- Explore global keyholders and schedule management features

**Goal:** Understand how customer records are created, organized, and configured in Manitou.

## **Week 3: Action Patterns & Alarm Handling**

*Estimated Time: 4–5 hours*

- Complete the “Action Pattern Creation” and “Enhanced Action Pattern” eLearning modules
- Learn how workflows automate alarm response
- Complete the “Alarm Handling eLearning” module
- Practice signal testing using the System Test feature if available

**Goal:** Gain confidence in managing alarms and workflows inside Manitou.

## **Week 4: Supervisory Tools & Review**

*Estimated Time: 3–4 hours*

- Complete the “Supervisor Workstation” module (for system admins or leads)
- Review administrative functions and alarm queue management
- Watch “How-To” videos for key operations like dashboard creation, importing zones, and testing action patterns
- Revisit any modules related to your unique configuration (e.g., BoldNet, MediaGateway, video, GPS)

**Goal:** Strengthen administrative and reporting capabilities, reinforce learning, and prepare questions for your live sessions.

**Total Time Estimate: 14–18 hours over 4 weeks**

This training is self-paced. Encourage your team to take notes, identify questions, and share learning progress during implementation meetings. Completing this plan will help you maximize the value of your upcoming instructor-led training.

## **Live Training with Your Application Consultant**

Once your team has completed the self-guided eLearning, you’ll meet with a Bold Group Application Consultant for live, instructor-led training. These sessions are held virtually through GoToMeeting, Zoom, or Microsoft Teams and provide you with direct, hands-on support as you begin working in your own Manitou environment.

This is your opportunity to ask questions, walk through real workflows, and apply what you’ve learned in your system. Our Application Consultants are experts in Manitou—and they’re here to ensure you feel confident using the tools and features you’ve purchased.

## **What to Expect During Live Training:**

- Customized walkthroughs based on your configuration and use cases

- Guided instruction for alarm handling, customer setup, data entry, and more
- Troubleshooting support and how-to demonstrations
- Time for Q&A tailored to your business operations and team needs

Live training is delivered in scheduled blocks based on the number of hours purchased with your Sales agreement. If additional training time is needed after implementation, more hours can be purchased at any time. Your Project Manager or Customer Success Manager can help coordinate this.

**Pro Tip:** Bold Group also offers free learning opportunities through webinars on hot topics, new features, and advanced workflows.

To stay informed about upcoming Manitou training events, visit:  
<https://www.boldgroup.com/events>

You can also sign up for alerts about future webinars and product updates through our website.

## What Topics Are Typically Covered in Live Training?

Live sessions are always customized to your environment, but here are common examples of what our Application Consultants have helped customers with:

- **Using the Customer Wizard** to add new customer records, systems, zones, and call lists
- **Configuring Action Patterns** for customized alarm workflows
- **Setting up and testing receivers and signal paths** (e.g., connecting panels to verify alarm transmission)
- **Video integration walkthroughs** for customers with camera or VCC modules
- **Importing global keyholders and managing contact schedules**
- **Exploring the Supervisor Workstation** to generate reports, manage user permissions, and oversee alarm queues
- **InstantConnect & MediaGateway setup and troubleshooting**
- **Hands-on alarm handling practice**, including responding to test signals
- **Q&A sessions for unique business workflows or integrations**

These sessions are collaborative and highly interactive- designed to help your team feel confident using Manitou in real-world scenarios.

## Role-Based Training Guidance

Successful Manitou implementations rely on the right people receiving the right training. While your entire team benefits from a foundational understanding of the software, different roles will interact with Manitou in unique ways. Use the chart below to assign training responsibilities by role, ensuring your users are confident and well-prepared before go-live.

ROLE	RECOMMENDED TRAINING MODULES	PURPOSE

System Administrator	<ul style="list-style-type: none"> <li>- Supervisor Workstation module</li> <li>- Administrative tools and system settings</li> <li>- Server access, backup procedures, service restart (MSM)</li> <li>- User permissions &amp; security setup</li> </ul>	Manages technical configuration, user setup, and backend system maintenance
Implementation Lead / SME	<ul style="list-style-type: none"> <li>- All Week 1–4 Self-Guided eLearning modules</li> <li>- Live Application Consultant training</li> <li>- Data staging overview and C1/C2 process</li> </ul>	Oversees the entire implementation, supports all internal teams, serves as go-to expert
Alarm Operators / Dispatch	<ul style="list-style-type: none"> <li>- Week 1: Getting Started with Manitou</li> <li>- Week 3: Alarm Handling &amp; Action Patterns</li> <li>- Signal testing / System Test features</li> </ul>	Learns day-to-day operations, alarm response workflows, and operator interface navigation
Data Review Specialist	<ul style="list-style-type: none"> <li>- Week 2: Core Data Entry &amp; Customer Setup</li> <li>- Week 4: Review &amp; Supervisory Tools</li> <li>- Live training on Customer Wizard and import validation</li> </ul>	Prepares, validates, and reviews data imports for accuracy during testing and go-live prep
On-Site Technical Contact	<ul style="list-style-type: none"> <li>- Week 1: Web Client Overview</li> <li>- Week 3: Signal Testing and Receiver Setup</li> <li>- System Requirements and Hardware Checklist Review</li> </ul>	Supports remote installation and ensures on-prem hardware and networking readiness
Trainer / Internal Support	<ul style="list-style-type: none"> <li>- All Week 1–4 modules</li> <li>- Live sessions focused on user onboarding and system functionality</li> <li>- Rewatch key BoldU content for reinforcement</li> </ul>	Trains additional staff internally and provides long-term support for new users

**Tip:** Encourage team members to take notes and document questions during self-guided learning. These can be addressed in your live training sessions with the Application Consultant.

## — PHASE 5: DATA CONVERSION & TESTING

PHASE	DESCRIPTION
<b>C1 Test</b>	Initial import; customer audits staging data
<b>Data Audit</b>	Customer identifies changes in staging document
<b>C2 Test</b>	Verifies cleaned-up data
<b>Final Conversion</b>	Performed at go-live cutover time

Customer Responsibilities:

- Scrub and prepare data exports
- Complete pre-conversion questionnaire
- Review data imported and track changes

### Data Conversion: Preparing for a Smooth Transition

Data is the heart of your monitoring operations—and bringing it into Manitou accurately and thoughtfully is one of the most important parts of your onboarding journey. Our goal is to ensure the data you rely on every day is fully aligned with how Manitou works, so you can hit the ground running with clean, structured, and usable information.

Whether you're migrating from a legacy platform or starting fresh, your Bold Group team will walk you through every step of the data conversion process. We'll guide you in reviewing your current data, identifying any gaps, and mapping it into Manitou's format.

**Your engagement during this step makes all the difference.** The more you participate in reviewing, validating, and organizing your data, the faster and more successful your implementation will be.

## What to Expect from the Conversion Process

The conversion process typically includes:

1. **Kickoff & Planning:** We'll schedule an initial call to review your legacy data sources and define which types of data are in scope (i.e., customer accounts, zones, call lists, panels, keyholders, etc.).
2. **Staging File Review (C1):** Bold Group will generate a sample import using your raw data. You'll review this "staging" environment and submit any corrections using our Change Tracking document. A data review call is expected prior to delivery of the first conversion pass.
3. **C2 Test Pass:** After applying your feedback, we'll provide an updated version for review. This version should be close to final.
4. **Final Conversion:** Once the data is approved, we'll coordinate a live cutover—bringing the approved data into your production system as part of the Go-Live process.

## What You Should Be Preparing

To get started, we recommend assembling or reviewing the following types of information from your current system:

DATA CATEGORY	EXAMPLES OF WHAT YOU'LL NEED
Customers & Systems	Names, addresses, phone numbers, account numbers, system types
Zones & Panels	Zone descriptions, panel types, transmitter IDs, alarm priorities
Keyholders	Contact info, call order, access permissions
Dealers & Branches	Names, contact info, linked accounts (if applicable)
Authorities	Police/fire department contacts by zip code or region
Monitoring Settings	Event types, instructions, site notes, action patterns

The [Manitou Data Dictionary \(PDF\)](#) and [Manitou Data Entry eLearning](#) page are excellent tools for understanding how each data type is used and where it appears within the system.

## Tools & Resources

- [Customer Data Entry Overview](#)

- [Dealer/Branch/Authority Setup](#)
- [Global Keyholders & Contacts](#)
- [Operations Management Tips](#)

## Need Help?

Your Project Manager and Data Conversion Specialist are here to support you. Don't hesitate to ask questions or request a walkthrough of how your data will look in Manitou.

## — PHASE 6A: GO-LIVE

The Go-Live phase is the final stage in your Manitou implementation. During this phase, your test environment transitions into a fully operational system. It is essential that all stakeholders are aligned, data is verified, and your team is ready to operate confidently within Manitou. Below is a checklist to help you prepare for a smooth and successful go-live experience.

### Go-Live Readiness Checklist

The following checklist helps ensure your team is fully prepared for a smooth and successful transition to the live Manitou system. These steps should be reviewed and completed prior to final data conversion and cutover. It is intended to provide clarity and confidence as you approach your go-live date.

- All required hardware is installed, networked, and accessible to Bold Group.
- Static IP addresses assigned, and server configurations completed as per System Configuration Document (SCD).
- System Delivery completed by Bold Group and signal traffic successfully routed to test environment.
- Data staging documents are completed and approved by both customer and Bold Group.
- C1 and C2 test conversions completed; data audit feedback applied.
- EAP (Event Action Plan) configured and verified with test alarms.
- Alarm handling staff trained and able to log in and process alarms using Manitou Web Client.
- On-site or virtual Train-the-Trainer program completed, and internal SMEs identified.
- Practice cutover successfully completed, including signal tests and login validation.
- Support portal access set up for relevant users, including credentials and escalation contacts.
- Final go-live cutover date scheduled and confirmed by customer and Project Manager.
- Support handoff plan discussed, including escalation paths, contact numbers, and post-go-live availability.
- Post Go-Live Transition (6–10 business days): Monitor issues, engage with Support and CSM

## — PHASE 6B: DEFINED SUCCESS METRICS

Implementing Manitou is a strategic investment in your operations, your team, and your future growth. To help ensure a successful onboarding experience, we believe it's essential to define what success looks like for your organization—*before* the implementation begins.

Your assigned Customer Success Manager (CSM) may collaborate with you to establish a **Success Plan** prior to the start of your project. This plan outlines your unique business goals and desired outcomes with Manitou and will serve as a reference point throughout your implementation and long-term partnership with Bold Group. It helps ensure alignment, accountability, and continuous value from your investment in Manitou.

Below are key success metrics that most customers use to track progress and confirm system readiness.

## Operational Success Metrics

- **Successful Signal Traffic Routing:**  
*Goal:* 100% of live alarm signals are received and processed in Manitou after cutover  
*Why It Matters:* Verifies that Manitou is actively receiving and routing all alarm traffic from your receivers.
- **Operator Alarm Handling Time:**  
*Goal:* Decrease or stabilize handling times compared to your previous platform  
*Why It Matters:* Indicates improved efficiency and usability for dispatchers and operators.
- **Alarm Queue Visibility:**  
*Goal:* All incoming signals appear in appropriate queues for processing  
*Why It Matters:* Ensures transparency and effective prioritization of signals.
- **System Uptime:**  
*Goal:* 99.9% availability during the first 30 days post-go-live  
*Why It Matters:* Confirms stability and reliability of the on-prem system infrastructure.

## Implementation Milestone Metrics

- **C1 and C2 Data Conversions Completed:**  
*Goal:* Complete with minimal rework and strong data integrity  
*Why It Matters:* Ensures that customer records and alarm data are clean and usable in Manitou.
- **Go-Live Readiness Checklist Completion:**  
*Goal:* 100% of items completed before final cutover  
*Why It Matters:* Indicates preparedness across people, process, and technology.
- **Train-the-Trainer Completion:**  
*Goal:* Internal SMEs trained and equipped before go-live  
*Why It Matters:* Empowers your team to support new users and reinforces system adoption internally.

## User Adoption Metrics

- **Self-Guided Training Completion Rate:**  
*Goal:* 100% of assigned users complete all required training modules  
*Why It Matters:* Ensures core users are confident and ready for live training and system use.

- **Live Training Attendance:**

*Goal:* All key roles attend and participate in live Application Consultant sessions

*Why It Matters:* Fosters engagement, addresses questions early, and sets the stage for team readiness.

- **Support Portal Access & Usage:**

*Goal:* All users are able to log into the Bold Group Support Portal and submit tickets within the first week

*Why It Matters:* Promotes independence, proper escalation, and faster resolution of issues.

## Long-Term Success Indicators

After go-live, your Customer Success Manager will continue to work with you to review and track success over time. These long-term indicators may include:

- Reduction in open support cases related to basic system usage
- Consistent use of Action Patterns and automated alarm workflows
- Adoption of optional modules (e.g., Video Control Center, MediaGateway)
- Improved internal response times and reduced alarm fatigue
- Quarterly check-ins to assess progress against your Success Plan

## Your Success is Our Success

Success isn't one moment—it's a journey. We're here to ensure you get maximum value from Manitou not just at go-live, but every step of the way. Your Success Plan and the metrics above will serve as guideposts for implementation and beyond, helping you measure impact, identify areas for improvement, and build confidence with Manitou.

## — PHASE 7: SUPPORT & LONG-TERM SUCCESS

Your Customer Success Manager will support you post-onboarding to ensure long-term success.

### Support Resources:

- Support Portal: <https://support.boldgroup.com>
- Support Phone: (719) 593-2829 or (800) 255-BOLD
- Support Hours: Monday–Friday, 8:00AM–6:00PM ET

### Post-Go-Live Success Planning

Go-live is not the finish line—it's the starting point of your long-term success with Manitou. Once your system is fully live and your users are engaged, Bold Group shifts from implementation support to proactive partnership. Depending on your account type, you will work with either a **Customer Success Manager (CSM)** or your **Account Manager** to ensure you're seeing measurable value from your investment.

The following page outlines what to expect post-go-live and how to stay on track with continued adoption, optimization, and growth.



## Who Supports You After Go-Live

Following go-live, your **Customer Success Manager** or **Account Manager** will become your main point of contact. They are here to:

- Ensure your team is confident using Manitou in production
- Monitor adoption and customer health indicators
- Connect you with training resources, updates, and product news
- Help you explore advanced features and add-on modules
- Serve as your advocate within Bold Group for ongoing success

If you're unsure who your post-go-live contact is, your Project Manager can help clarify this during your support handoff.

## 30–60–90 Day Success Framework

### Within 30 Days

- Confirm all users have access to the Support Portal
- Validate that alarm traffic is flowing properly
- Finalize any open questions from training or go-live
- Ensure internal SMEs are equipped to support new users
- Identify any remaining post-conversion adjustments

### Within 60 Days

- Participate in a post-go-live check-in or Quarterly Business Review (QBR), if applicable
- Review Action Pattern performance and user activity
- Determine if additional training or configuration adjustments are needed
- Begin tracking success metrics defined during onboarding
- Identify opportunities to streamline operations using automation tools

### Within 90 Days

- Evaluate readiness for additional Manitou modules (e.g., VCC, BoldNet, MediaGateway)
- Review open support cases and discuss escalation best practices
- Explore reporting and dashboards to track ongoing performance
- Align your Manitou configuration with evolving business needs
- Discuss long-term roadmap and upcoming product enhancements

## Recommended Customer Actions Post-Go-Live



- **Schedule a check-in** with your Account Manager or CSM to evaluate performance and discuss next steps
- **Assign a system owner internally** to champion Manitou adoption and usage
- **Review Key Metrics** regularly (e.g., alarm handling time, case resolution rate)
- **Use the Sandbox Environment** to test new workflows or configurations
- **Continue Training** with BoldU, webinars, and Knowledge Base articles

#### **Need Help? We're Here.**

- **Technical Support:** For troubleshooting and issue resolution
- **Account Manager or CSM:** For strategic guidance, training, adoption, and account growth
- **Sales Team:** For licensing, expansions, or product roadmap discussions

The transition from implementation to sustained success is where many customers see the greatest impact—and we're committed to supporting you at every step.

## 4. GETTING HELP AFTER GO-LIVE

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Bold Group offers a wealth of resources to ensure you have success using your Manitou 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 on Bold Group's [support portal](#) or by calling (719) 593-2829 or (800) 255-BOLD.

Bold Group's **standard support hours** for Manitou 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 Manitou 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 Manitou knowledge base is your go-to resource for getting immediate answers to your Manitou questions and getting the most value from your software.

### Accessing the Knowledge Base

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



[Manitou Knowledge Base](#)



### Key Resources in the Knowledge Base

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

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

## — ADDITIONAL SUPPORT & LEARNING RESOURCES

### Status Page

The Bold Group status page is a support tool that allows you to see the status of the Manitou 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 Manitou 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 Manitou 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 Manitou 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 MANITOU ACCOUNT

If you have billing questions or need help with an invoice, please contact the Manitou 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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### — ADD-ON MODULES & NEXT STEPS

Manitou's modular architecture allows your system to grow along with your needs. Below is a detailed overview of available add-ons, inclusion criteria, compatibility details, and advice on when to consider each. Your **Account Manager**, **Project Manager**, or **Customer Success Manager** can help you evaluate these options based on your operations.

#### Video Control Center (VCC)

- **What it does:** Supports alarm-linked live and recorded video playback (pre/post alarm), PTZ control, and event-based video views.
- **Compatibility:** Integrates with ONVIF-compliant cameras (Profile S, T, G) and many third-party video devices.
- **When to consider:** Use if you need real-time visual verification, faster event confirmation, or want to reduce false alarms by confirming activity.
- **Readiness:** Requires IP camera infrastructure and network bandwidth sufficient for video streaming.

#### BoldNet Server

- **What it does:** Provides a secure web portal for dealers and clients to access real-time account data, signal status, and history.
- **Compatibility:** Built-in web-based interface that works with your existing Manitou database.
- **When to consider:** Ideal for organizations looking for self-service reporting or remote oversight across multiple sites.
- **Readiness:** Requires dedicated licensing and secure access configuration.

#### MediaGateway (Telephony & Text Integration)

- **What it does:** Handles voice, SMS, email, and data integrations—facilitates alerts, caller ID routing, AutoText templates, and IVR systems.
- **Compatibility:** Works with any PBX or telephony server; integrates through MediaGateway modules like TwoWayPLUS, UniversalConnector, AutoText, OpenVoice, and PBXEnterprise.
- **When to consider:** Use when dispatch call flows require automation, voice response, or SMS escalation to reduce operator workload.
- **Readiness:** Requires telephony infrastructure and a review of call handling policies.

#### InstantConnect

- **What it does:** Automates low-priority call handling, reducing the need for operator involvement.
- **Compatibility:** Built into Manitou's action framework; requires proper alarm classifications.

- **When to consider:** Appropriate for tiered alarm strategies where certain events are automatically handled.
- **Readiness:** Requires clear categorization of alarm priorities and workflow alignment.

## Integration Modules (GPS, PSIM, Access Control, PBX)

- **What it does:** Enables deeper integrations via APIs and modules for GPS tracking, PSIM platforms, PBX, and access control.
- **Compatibility:** Supports standard protocols and customized API builds.
- **When to consider:** If you manage multiple systems that would benefit from shared signals, alarms, or commands.
- **Readiness:** Requires a clear integration plan, endpoint access, and potentially custom development.

## Training Enhancements (BoldU, Webinars)

- **What it does:** Additional learning resources including advanced self-paced courses and live expert-led webinars.
- **Compatibility:** Accessible online and available to all customers.
- **When to consider:** When onboarding large teams, refreshing skills, or training new hires post-go live.
- **Readiness:** Ideal for teams committed to ongoing adoption and growth.

# — FREQUENTLY ASKED QUESTIONS

### What is Manitou?

Manitou is a centralized, web-based alarm monitoring solution that integrates intrusion, fire, access control, GPS tracking, and video surveillance—all from a single interface.

### Can I access Manitou from different devices?

Yes. Manitou is device-independent and responsive, allowing use from desktop PCs, laptops, tablets, and smartphones.

### What deployment options are available?

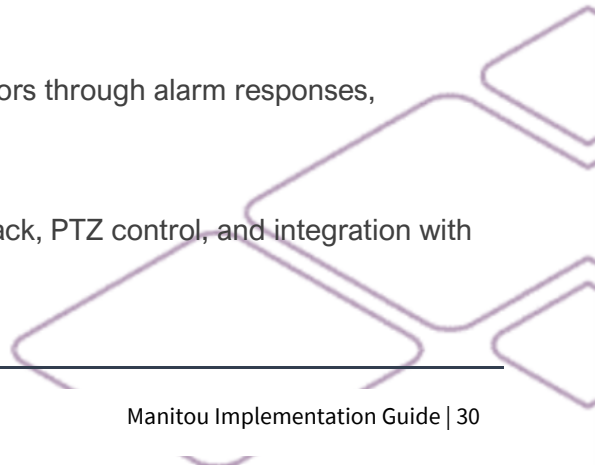
Manitou can be deployed either on-premises (using your local infrastructure) or via Manitou Cloud Services, a UL-certified, fully redundant hosting solution. This guide specifically covers the **on-premises version**. If you are implementing Manitou Cloud, please refer to the separate Manitou Cloud Onboarding Guide or ask your Project Manager for access.

### How does Manitou streamline alarm workflows?

Manitou uses Action Patterns—step-by-step workflows that guide operators through alarm responses, improving speed and accuracy.

### Can I integrate video features?

Yes. The Video Control Center (VCC) supports alarm-linked video playback, PTZ control, and integration with third-party camera systems.



**What third-party integrations are supported?**

Manitou supports APIs and modules for PBX systems, GPS, PSIM, databases, video systems, and access control platforms.

**How do I onboard a new customer account?**

Use the Customer Wizard to step through customer setup, including addresses, contacts, systems, zones, schedules, and call lists.

**What are “Systems” in Manitou?**

Systems define the types of monitoring (e.g., alarm, access, GPS) and include configurations like transmitters, zones, and response actions.

**How does signal programming work?**

Each transmitter’s alarms and zones are configured in TX Programming to ensure correct mapping of incoming signals to actions and notifications.

**How are signals tested within Manitou?**

You can use System and Query Tests to generate test signals and verify how they appear and respond within Manitou.

**How do I manage video devices?**

Video devices can be added under the System → Devices menu. Discovery tools help connect and configure cameras within the VCC.

**Can I generate reports?**

Yes. Manitou includes dashboards and a robust reporting engine. Users can create standard or custom reports to track performance.

**How do I stay updated with new features?**

Feature updates and release notes are published regularly in the Manitou Knowledge Base.

**What training resources are available?**

Training includes BoldU self-paced eLearning courses, instructor-led virtual sessions, on-site training (if purchased), and searchable articles in the Manitou Knowledge Base. You'll be guided through a recommended four-week training plan, and your Application Consultant will tailor live training to your environment and business needs.

**What if the web client chimes don’t sound?**

Check that Chrome tab audio is not muted and disable autofill or popup blockers that could interfere with alerts.

**How do I troubleshoot Windows service failures?**

Check for disk space issues, path conflicts, and service dependencies. The Manitou Service Manager (MSM) can be used to restart services.

**How do I submit a feature request?**

Feature requests can be submitted via the Support Portal and are reviewed by the product development team.

**What support is available?**

Support is available Monday through Friday, 8 AM to 8 PM ET. After-hours emergency support is also available.



### **How do I report an issue?**

Log into the Support Portal to submit a support ticket. Be sure to include system logs or screenshots if needed.

### **Where can I view system status or maintenance updates?**

Check the Status Page for real-time system performance, maintenance schedules, and incident notifications.

### **Does Manitou support professional services?**

Yes. Bold Group offers application consulting, technical services, and custom training engagements upon request.

### **How does billing/invoicing work?**

Billing for software, licensing, support, and services follows the terms outlined in your Bold Group service agreement.

### **How do I access the Knowledge Base?**

The Manitou Knowledge Base can be accessed directly online or through the in-app help menu.

### **Can I host Manitou on-premises in my UL-listed environment?**

Yes. Manitou can be hosted in a customer's UL-certified environment, with full support for backup, replication, and compliance requirements.

### **What is the parallel test environment and how do I use it?**

Before go-live, Manitou runs in a parallel test mode alongside your current system. This allows you to test alarm traffic, explore workflows, and train your team using your actual data. You'll monitor both platforms simultaneously to verify that signals and data behave as expected. Once you're ready, you'll complete a physical cutover and begin using Manitou as your live system.

### **Who should complete training and how long does it take?**

Training is divided by role and includes both self-guided eLearning (14–18 hours over 4 weeks) and live training with an Application Consultant. Operators, administrators, and data managers all have specific learning paths. A Role-Based Training Guidance section is included in this guide to help you assign training effectively.

### **What is a Success Plan and how is it used?**

Your Customer Success Manager may collaborate with you to define a Success Plan prior to onboarding. This document outlines your business goals and serves as a shared roadmap to ensure Manitou is delivering ongoing value. It's used during onboarding and throughout your relationship with Bold Group to measure success and identify optimization opportunities.

### **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 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 Manitou 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 Manitou.

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

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 Manitou product updates to provide continuous improvement to your system. You can find release notes for the latest Manitou product releases by visiting the [Release Notes](#) section of the Manitou 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 Manitou 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 Manitou 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](https://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 Manitou'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 Manitou's billing team at [Perennial\\_AR@boldgroup.com](mailto:Perennial_AR@boldgroup.com) for instructions.

### **When does monthly recurring billing start for my Manitou 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.

### **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>



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



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



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



Manitou Billing Portal – <https://sobilling.Manitouapp.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>