Proposals and Service Contracts (CRM Sales Workflow)

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Following the creation of a prospect account and a lead, proposals and service contracts can be created.

Prerequisites

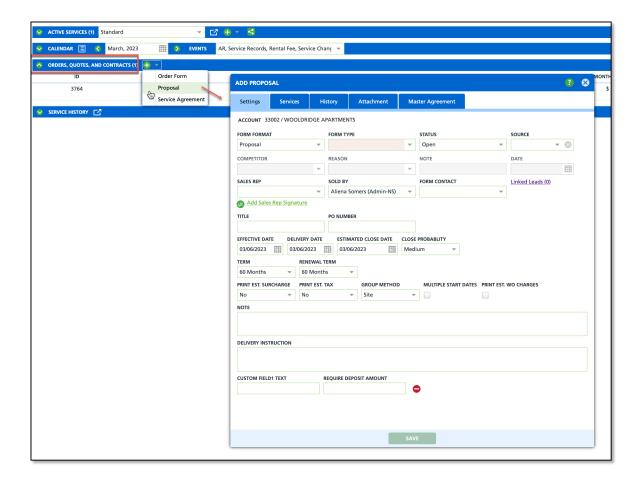
Review the following article before continuing further:

• Create Prospect Accounts and Leads (CRM Workflow)

Proposals

Pathway: Accounts > Search Account > Orders, Quotes and Contracts

Proposals can be generated for both active and prospect accounts to provide quotes for modifications to existing services, additions of new services, or quoting new business opportunities. It's important to note that proposals are not service agreements or contracts on their own and do not include a legally binding signature section. For detailed instructions on creating a proposal, refer to the Related Articles section below.



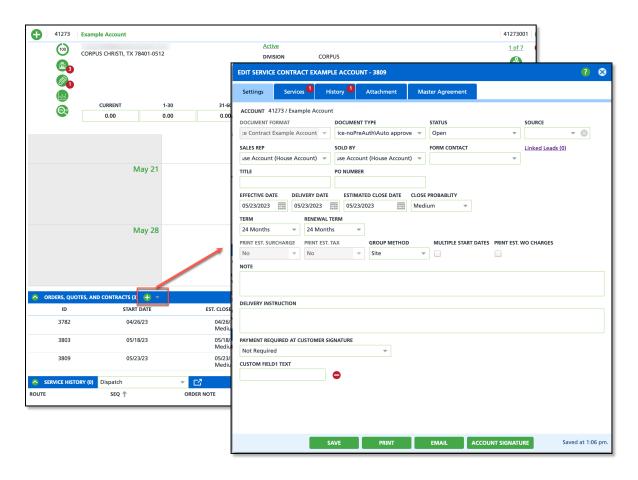
Related Articles

• Create a Proposal

Contracts/Service Agreements

Pathway: Accounts > Search Account > Orders, Quotes and Contracts

When the customer is ready to sign, the proposal can be converted to a Contract. Contracts and Service Agreements are different than proposals and require a signature for the services quoted. For the most part, a Service Contract or Service Agreement contains the same fields and has the same information as what the proposal gathered.



Related Articles

• Create a Service Contract