

Proposals and Service Contracts (CRM Sales Workflow)

Last Modified on 02/03/2025 7:44 am PST

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.

The screenshot shows the 'ADD PROPOSAL' form in a CRM system. The form is for account '33002 / WOOLDRIDGE APARTMENTS'. It includes the following fields and options:

- FORM FORMAT:** Proposal
- FORM TYPE:** Open
- STATUS:** Open
- SOURCE:** (Dropdown menu)
- COMPETITOR:** (Dropdown menu)
- REASON:** (Dropdown menu)
- NOTE:** (Text area)
- DATE:** (Calendar icon)
- SALES REP:** (Dropdown menu)
- SOLD BY:** Aliena Somers (Admin-NS)
- FORM CONTACT:** Linked Leads (0)
- ADD SALES REP SIGNATURE:** (Green button)
- TITLE:** (Text field)
- PO NUMBER:** (Text field)
- EFFECTIVE DATE:** 03/06/2023
- DELIVERY DATE:** 03/06/2023
- ESTIMATED CLOSE DATE:** 03/06/2023
- CLOSE PROBABILITY:** Medium
- TERM:** 60 Months
- RENEWAL TERM:** 60 Months
- PRINT EST. SURCHARGE:** No
- PRINT EST. TAX:** No
- GROUP METHOD:** Site
- MULTIPLE START DATES:** (Checkbox)
- PRINT EST. WO CHARGES:** (Checkbox)
- NOTE:** (Text area)
- DELIVERY INSTRUCTION:** (Text area)
- CUSTOM FIELD1 TEXT:** (Text field)
- REQUIRE DEPOSIT AMOUNT:** (Text field with a red minus sign)
- SAVE:** (Green button)

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.

The screenshot displays a software interface for managing accounts and contracts. On the left, a sidebar shows account information for '41273 Example Account' with a balance of 0.00. A calendar view highlights dates May 21 and May 28. A red arrow points from the 'ORDERS, QUOTES, AND CONTRACTS (3)' menu item to the 'EDIT SERVICE CONTRACT' form. The form, titled 'EDIT SERVICE CONTRACT EXAMPLE ACCOUNT - 3809', contains various fields for contract details:

- ACCOUNT:** 41273 / Example Account
- DOCUMENT FORMAT:** Contract Example Account
- DOCUMENT TYPE:** ice-noPreAuthAuto approve
- STATUS:** Open
- SOURCE:** (dropdown)
- SALES REP:** use Account (House Account)
- SOLD BY:** use Account (House Account)
- FORM CONTACT:** (dropdown)
- LINKED LEADS:** (0)
- EFFECTIVE DATE:** 05/23/2023
- DELIVERY DATE:** 05/23/2023
- ESTIMATED CLOSE DATE:** 05/23/2023
- CLOSE PROBABILITY:** Medium
- TERM:** 24 Months
- RENEWAL TERM:** 24 Months
- PRINT EST. SURCHARGE:** No
- PRINT EST. TAX:** No
- GROUP METHOD:** Site
- MULTIPLE START DATES:** (checkbox)
- PRINT EST. WO CHARGES:** (checkbox)
- NOTE:** (text area)
- DELIVERY INSTRUCTION:** (text area)
- PAYMENT REQUIRED AT CUSTOMER SIGNATURE:** Not Required
- CUSTOM FIELD1 TEXT:** (text area)

At the bottom of the form, there are buttons for 'SAVE', 'PRINT', 'EMAIL', and 'ACCOUNT SIGNATURE'. The status 'Saved at 1:06 pm.' is displayed in the bottom right corner.

Related Articles

- [Create a Service Contract](#)