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

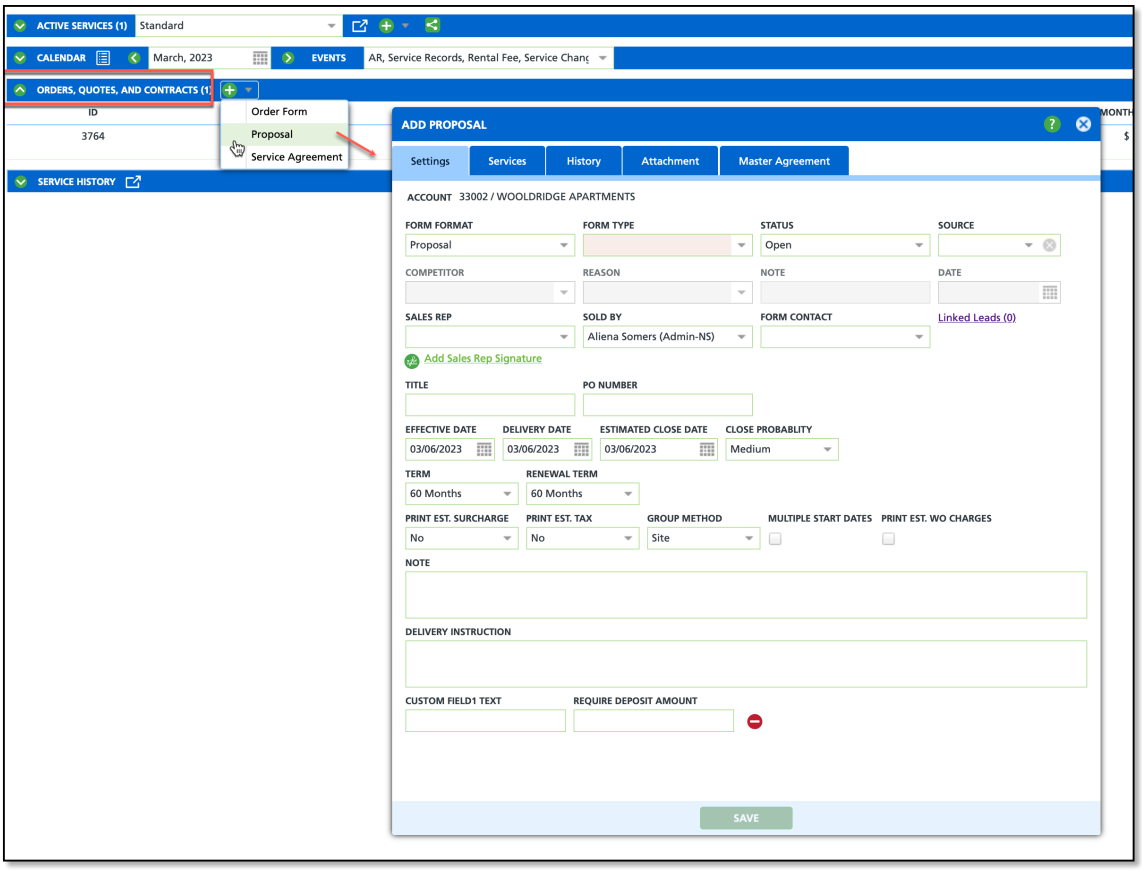
Review the following article before continuing further:

- Create Prospect Accounts and Leads (CRM Workflow)

Proposals

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

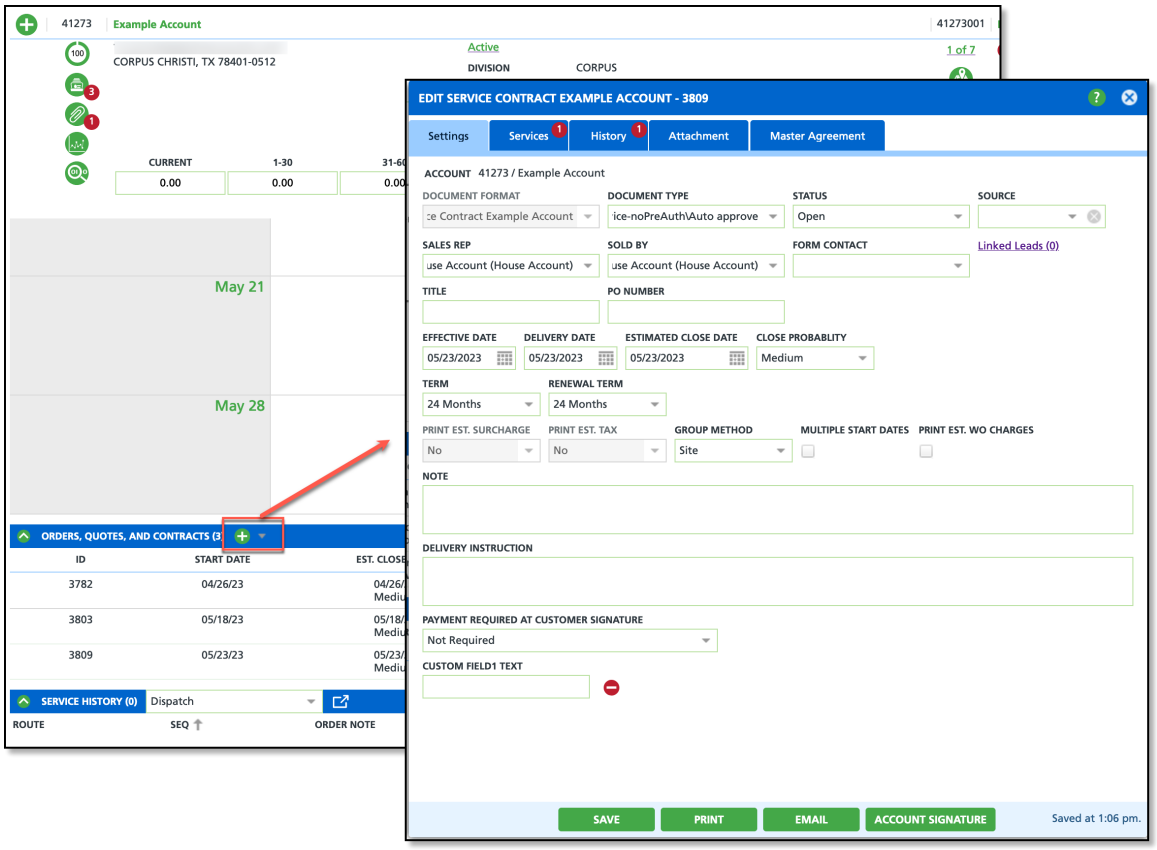
Proposals can be generated for both active and prospect accounts to provide quotes for modifications to existing services, additions of new services, or quoting new business opportunities. It's important to note that proposals are not service agreements or contracts on their own and do not include a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



Contracts/Service Agreements

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

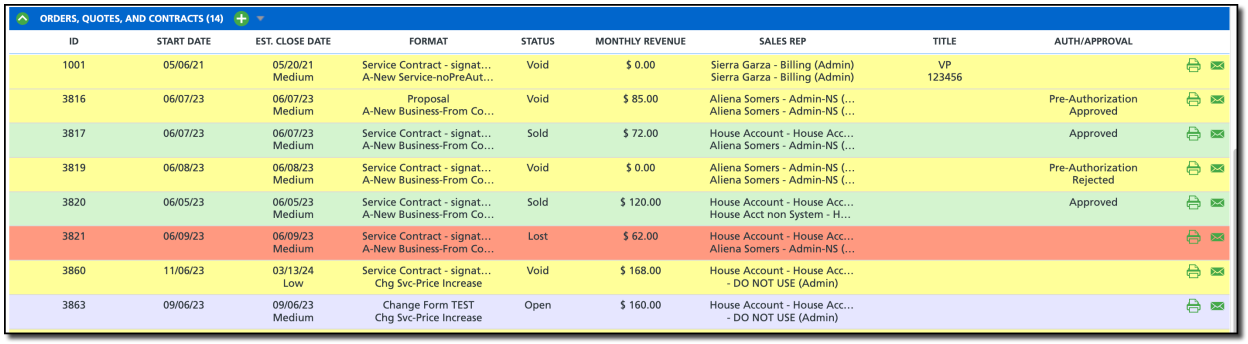
When the customer is ready to sign, the proposal can be converted to a Contract. Contracts and Service Agreements are different than proposals and require a signature for the services quoted. For the most part, a Service Contract or Service Agreement contains the same fields and has the same information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



Orders, Quotes, and Contracts Grid

Use the Orders, Quotes, and Contracts grid to manage and view the status of various contracts such as proposals, service agreements and change forms.

From this grid, you can see general information, print, email, or double click on a row to see details for that order, quote, or contract.



ID	START DATE	EST. CLOSE DATE	FORMAT	STATUS	MONTHLY REVENUE	SALES REP	TITLE	AUTH/APPROVAL
1001	05/06/21	05/20/21 Medium	Service Contract - signat... A-New Service-noPreAut...	Void	$ 0.00	Sierra Garza - Billing (Admin) Sierra Garza - Billing (Admin)	VP 123456	
3816	06/07/23	06/07/23 Medium	Proposal A-New Business-From Co...	Void	$ 85.00	Aliena Somers - Admin-NS (... Aliena Somers - Admin-NS (...		Pre-Authorization Approved
3817	06/07/23	06/07/23 Medium	Service Contract - signat... A-New Business-From Co...	Sold	$ 72.00	House Account - House Acc... Aliena Somers - Admin-NS (...		Approved
3819	06/08/23	06/08/23 Medium	Service Contract - signat... A-New Business-From Co...	Void	$ 0.00	Aliena Somers - Admin-NS (... Aliena Somers - Admin-NS (...		Pre-Authorization Rejected
3820	06/05/23	06/05/23 Medium	Service Contract - signat... A-New Business-From Co...	Sold	$ 120.00	House Account - House Acc... House Acct non System - H...		Approved
3821	06/09/23	06/09/23 Medium	Service Contract - signat... A-New Business-From Co...	Lost	$ 62.00	House Account - House Acc... Aliena Somers - Admin-NS (...		
3860	11/06/23	03/13/24 Low	Service Contract - signat... Chg Svc-Price Increase	Void	$ 168.00	House Account - House Acc... - DO NOT USE (Admin)		
3863	09/06/23	09/06/23 Medium	Change Form TEST Chg Svc-Price Increase	Open	$ 160.00	House Account - House Acc... - DO NOT USE (Admin)		

Each item (row) is highlighted based on status:

- Open - white/light gray
- Submitted to customer - blue
- Lost - red
- Rejected - pink
- Void - yellow
- Refused to sign - orange

- Sold / Vendor Agreed / Verbal Agreement - green

Related Articles

- Create a Service Contract
- Create a Proposal