

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.

The screenshot displays the 'ADD PROPOSAL' form within a CRM interface. The form is titled 'ADD PROPOSAL' and is associated with account '33002 / WOOLDRIDGE APARTMENTS'. The form includes several sections: 'FORM FORMAT' (Proposal), 'FORM TYPE' (empty), 'STATUS' (Open), and 'SOURCE' (empty). Below this, there are fields for 'COMPETITOR', 'REASON', 'NOTE', and 'DATE'. The 'SALES REP' is set to 'Aliena Somers (Admin-NS)'. There is a link for 'Add Sales Rep Signature'. The 'TITLE' and 'PO NUMBER' fields are empty. The 'EFFECTIVE DATE' is 03/06/2023, 'DELIVERY DATE' is 03/06/2023, and 'ESTIMATED CLOSE DATE' is 03/06/2023. The 'CLOSE PROBABILITY' is set to 'Medium'. The 'TERM' is 60 Months and 'RENEWAL TERM' is 60 Months. There are checkboxes for 'PRINT EST. SURCHARGE', 'PRINT EST. TAX', 'GROUP METHOD', 'MULTIPLE START DATES', and 'PRINT EST. WO CHARGES'. A 'NOTE' field is present but empty. A 'DELIVERY INSTRUCTION' field is also present but empty. At the bottom, there are fields for 'CUSTOM FIELD1 TEXT' and 'REQUIRE DEPOSIT AMOUNT'. A 'SAVE' button is at the bottom right. In the background, a navigation menu shows 'ORDERS, QUOTES, AND CONTRACTS' with a sub-menu containing 'Order Form', 'Proposal', and 'Service Agreement'. A red arrow points to the 'Proposal' option.

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 account management. 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' window. The main window, titled 'EDIT SERVICE CONTRACT EXAMPLE ACCOUNT - 3809', contains the following fields:

- 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)
- TITLE:** (text field)
- PO NUMBER:** (text field)
- 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 field)

At the bottom of the window, there are buttons for 'SAVE', 'PRINT', 'EMAIL', and 'ACCOUNT SIGNATURE'. A status bar at the bottom right indicates 'Saved at 1:06 pm.'.

Related Articles

- [Create a Service Contract](#)