

Closing a Sale and Lost Sales

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The last part of the sales CRM workflow involves capturing signatures from both the customer and service provider, verifying the contract was updated to a sold status and the account was updated from 'prospect' to 'active'.

Prerequisites:

Review the following articles to better understand the sales workflow leading up to closing a sale:

1. [Create Prospect Accounts and Leads](#)
2. [Proposals and Service Contracts](#)
3. [Manage Sales Pipelines and Followups](#)

Step 1: Convert Proposal Document to a Signature (Contract) Document

When a customer has indicated they would like to sign, the proposal document should be converted to a contract. Proposals and contracts differ in that proposals do not include a signature page where as a contract does. Review the *Related Articles* section below to learn more about converting proposals to service contracts.

EDIT PROPOSAL - 3813

Settings Services ¹ History ⁶ Attachment Master Agreement

ACCOUNT 41902 / Example Account 1

DOCUMENT FORMAT: Proposal
DOCUMENT TYPE: New Business-From Competit
STATUS: Submitted to Client
SOURCE: Web

SALES REP: House Account (House Accou)
SOLD BY: House Acct non System (Hou:)
FORM CONTACT: [Linked Leads \(0\)](#)

TITLE:
PO NUMBER:

EFFECTIVE DATE: 06/05/2023
DELIVERY DATE: 06/05/2023
ESTIMATED CLOSE DATE: 06/05/2023
CLOSE PROBABILITY: Medium

TERM: 24 Months

PRINT EST. SURCHARGE: No
PRINT EST. TAX: No
GROUP METHOD: Site
MULTIPLE START DATES:
PRINT EST. WO CHARGES:

NOTE:

DELIVERY INSTRUCTION: Container should be delivered on west side of the building, left side of loading dock 3 by the fence.

Related Articles:

[Create a Service Contract](#)

Step 2: Customer Signature

Once the proposal has been converted to a contract, it must be signed by the customer to create a legally binding agreement between both parties. Signatures can be captured electronically or manually (printed and signed);

however, if the contract is printed and signed, it will need to be uploaded and attached to the electronic version.

Email a Contract for Signature

The screenshot shows the 'EDIT SERVICE CONTRACT - SIGNATURE - 3814' interface. The 'EMAIL PROPOSAL' modal is open, displaying the following fields and content:

- SEND TO (EMAIL):** customerEmail@email.com
- EMAIL TO CONTACTS:** (empty dropdown)
- SUBJECT:** Service Contract - Signature Required
- FORMS:** (empty dropdown)
- INCLUDE ATTACHMENT?:**
- CC SALES REP:**
- CC SENDER:**
- Body:**

Dear John Doe

Thank you for choosing Navisoft Waste as your next waste service provider. Please review and sign the attached contract by [clicking here to review your service contract](#).

Please contact me directly if you have any questions or need additional information. I look forward to working together.

Have a great day!

House Account - House Account

PO BOX 123456

Corpus Christi, TX 78426
- SEND:** (green button)

At the bottom of the main form, the **EMAIL** button is highlighted with a red box and an arrow pointing to it. Other buttons include **SAVE**, **PRINT**, **ACCOUNT SIGNATURE**, and a status indicator **Saved at 9:38 am.**

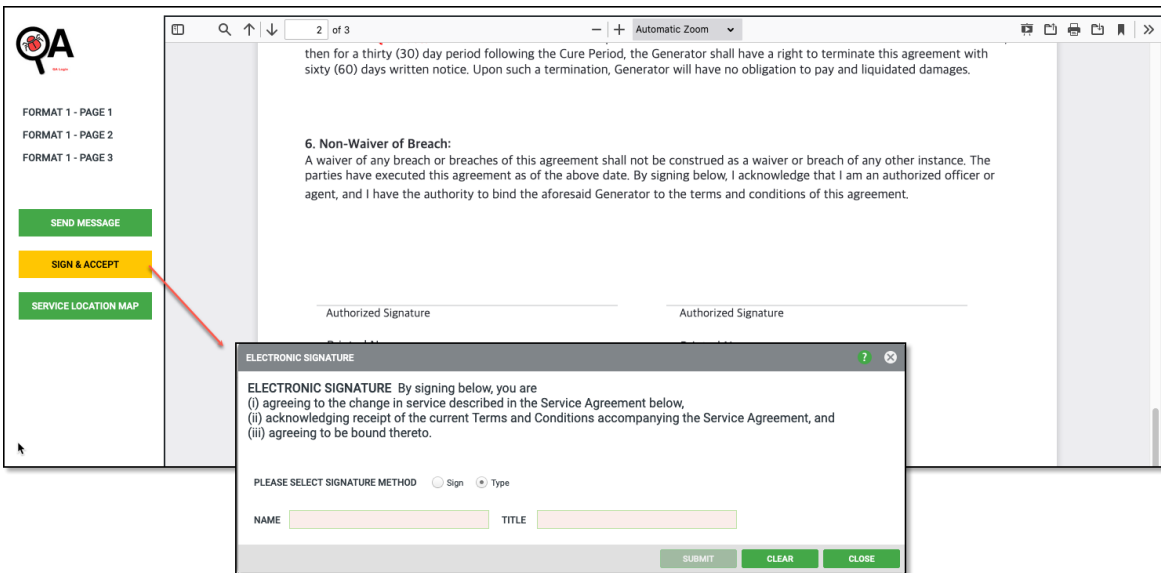
1. Select the **Email** button at the bottom of the service contract's screen.
2. Enter in the email address the contract should be sent to in the **Send To (Email)** field. This allows for sending the contract to someone other than the account/site contact.
3. *Optional* - select the name of an account contact from the **Email to Contacts** field. Otherwise, leave blank and the email will be sent to the address entered in the Send To field.
4. Select a **Subject** template from the drop down list of options. Once selected, the template name will populate in the Subject field and the message will populate in the body field. Edit the subject and the body to fit what is needed for the account.
5. If an attachment such as a Credit Card Authorization form should be included in the email, select it from the **Forms** drop down. Otherwise, leave blank. If a form is selected, check the '**Include Attachment**' check box.
6. *Optional* - select the check boxes to cc the sender and sales rep when the email is sent.
7. Click **Send** when finished.



When the customer receives the contract, they will need to select the **Sign & Accept** button displayed on the right side of the form. Upon selection, the Electronic Signature popup will display with two signature method options: Sign or Type.

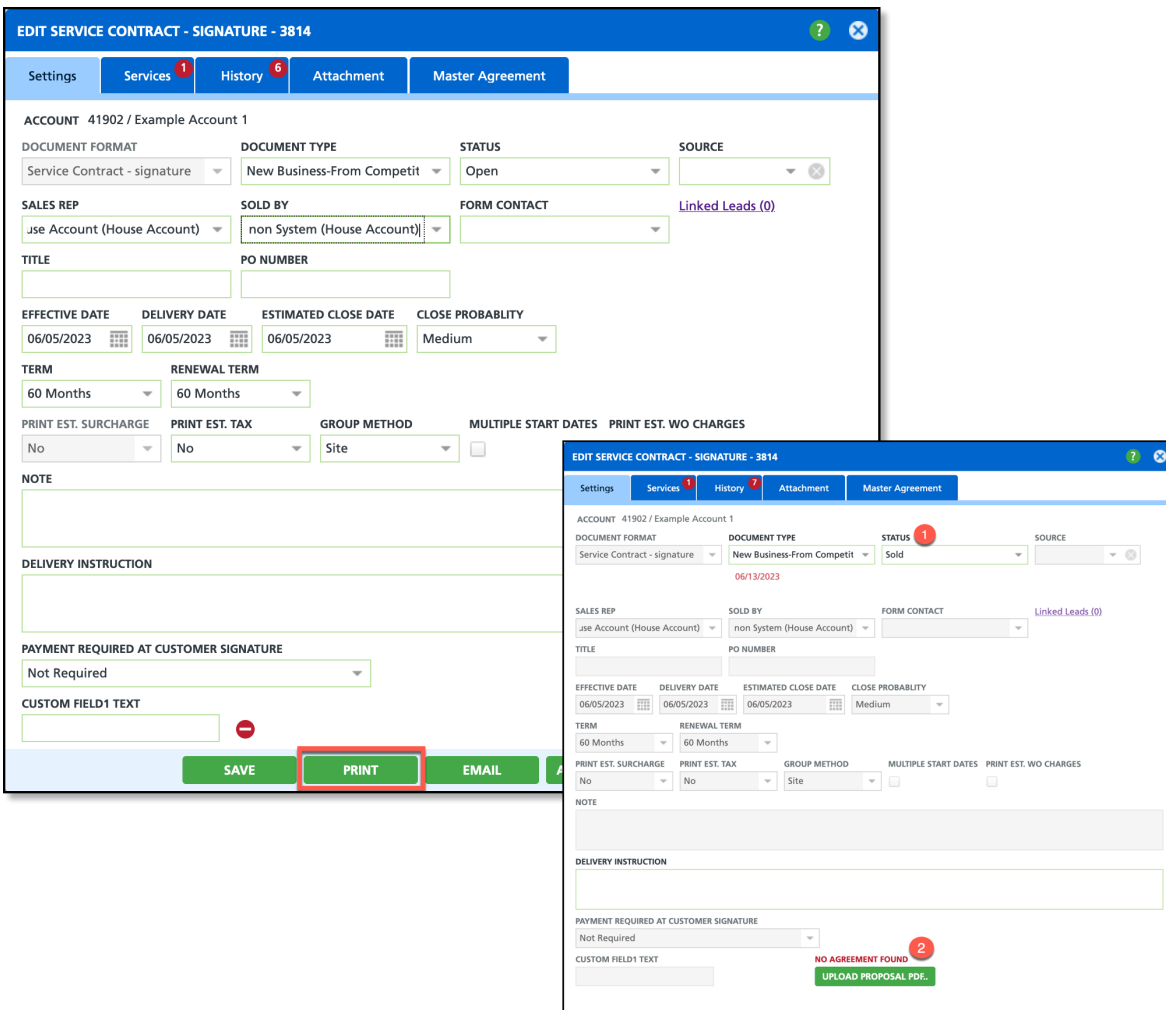
Sign: Customer must use their mouse to sign their name.

Type: Customer must type their name and title into the Name and Title fields.



Print Contract for Signature

Select the Print button to print a hard copy of the contract. After it has been signed, the sales rep must then update the contract's status to 'Sold' and attach the signed agreement.



Account Signature - In-Person Signature Option

An alternative option is also available to gather a signature in person. This option triggers the Electronic Signature popup window, allowing the sales representative to capture the customer's signature during their face-to-face interaction.

EDIT SERVICE CONTRACT - SIGNATURE - 3814

Settings Services ¹ History ³ Attachment Master Agreement

ACCOUNT 41902 / Example Account 1

DOCUMENT FORMAT: Service Contract - signature
DOCUMENT TYPE: New Business-From Competit
STATUS: Open
SOURCE: [Dropdown]

SALES REP: House Account (House Accou)
SOLD BY: Aliena Somers (Admin-NS)
FORM CONTACT: [Dropdown] [Linked Leads \(0\)](#)

TITLE: [Text Field]
PO NUMBER: [Text Field]

EFFECTIVE DATE: 06/05/2023
DELIVERY DATE: 06/05/2023
ESTIMATED CLOSE DATE: 06/05/2023
CLOSE PROBABILITY: Medium

TERM: 60 Months
RENEWAL TERM: 60 Months

PRINT EST. SURCHARGE: No
PRINT EST. TAX: No
GROUP METHOD: Site
MULTIPLE START DATES:
PRINT EST. WO CHARGES:

NOTE: [Text Area]

DELIVERY INSTRUCTION: [Text Area]

PAYMENT REQUIRED AT CUSTOMER SIGNATURE: Not Required

CUSTOM FIELD1 TEXT: [Text Field] -

SAVE PRINT EMAIL **ACCOUNT SIGNATURE**

Step 3: Countersignature

A countersignature from the sales representative recorded on the contract is required to complete the sale. This process will be different depending on whether or not the sales representative has automatic countersign enabled on their user profile.

Automatic Countersign

Pathway: *User Profile > (select) Automatic Countersign*

To activate automatic countersigning, access your user profile by clicking on your username in the upper right corner of the application and select "User Profile". Set the Automatic Countersign to 'Yes' and upload a pre-existing Signature Image saved on your local drive. Once done, click Save to finalize.

USER PROFILE

NAME: Adrian Jones

EMAIL: User@FakeEmail.com

CELL PHONE: (999) 999-9999

OFFICE PHONE: (999) 999-9999

TITLE: Admin-NS

DEFAULT HOMEPAGE: Recent Activity

DEFAULT APP COLOR: Blue

ONLINE IMAGE: Select photo... **BROWSE...**

AUTOMATIC COUNTERSIGN: No

SIGNATURE IMAGE: Select Image... **BROWSE...**

SAVE **CANCEL**

Add Sales Rep Signature - Applies if Automatic Countersign IS NOT Enabled

Pathway: Contract Document

If the sale representative's user profile does not have countersigning enabled, they will need to open the contract and select the 'Add Sales Rep Signature' link displayed below the Sales Rep drop down field. This link only displays after the customer has signed the contract.

EDIT SERVICE CONTRACT - SIGNATURE - 3814

ACCOUNT: 41904 / Example Account 1

DOCUMENT FORMAT: Service Contract - signature

DOCUMENT TYPE: New Customer

STATUS: Sold

SOURCE: Web

06/05/2023

SALES REP: House Account (House Accou)

SOLD BY: House Acct non System (Hou:)

FORM CONTACT: John Doe

Add Sales Rep Signature

TITLE:

PO NUMBER:

EFFECTIVE DATE: 06/05/2023

DELIVERY DATE: 06/05/2023

ESTIMATED CLOSE DATE: 06/05/2023

CLOSE PROBABILITY: Medium

TERM: 24 Months

RENEWAL TERM: 24 Months

PRINT EST. SURCHARGE PRINT EST. TAX GROUP METHOD MULTIPLE START DATES PRINT EST. WO CHARGES

Related Articles:

[Sales Management](#)

Step 4: Update Contract Status

Sold Status

During step 4, confirm that the account has been changed to a 'Sold' status after the contract has been signed. If the contract was signed electronically (via Email or Account Signature), the status will be updated automatically. However, if the contract was manually signed and uploaded, the status will require manual modification to 'Sold'.

Lost Status

Lost accounts are account contracts that were lost to a competitor. In that case, the contract will need to be manually changed to Lost. Although the contract was a loss, it will continue to populate in the following CRM Pipeline dashboards for future opportunities:

- Leads
- Leads Analysis

If a contract is lost, an optional setup allows for capturing details about the lost sale and identifying the competitor. The following logic and setup are used to gather additional information on lost contracts:

1. The Reason (code) field will be hidden until "Lost" is selected from the Status drop down.
2. The Competitor field will be hidden unless:
 - The selected Reason has "Capture Competitor" set to 'Yes' in *Setup > System > Reason Code*.

EDIT SERVICE CONTRACT - SIGNATURE (NEW) - 3860

Settings Services **1** History **8** Attachment Master Agreement

ACCOUNT 41902 / Example Account 1

DOCUMENT FORMAT: Service Contract - signature ()
DOCUMENT TYPE: Chg Svc-Price Increase
STATUS: Lost
SOURCE: Call In

REASON: Lost to Competitor
COMPETITOR: Waste Management
NOTE:
DATE: 09/15/2023 Fri

SALES REP: House Account (House Accou)
SOLD BY: Aliena Somers (Admin-NS)
FORM CONTACT:
[Linked Leads \(0\)](#)

TITLE:
PO NUMBER:
EFFECTIVE DATE: 08/25/2023
DELIVERY DATE: 08/25/2023
ESTIMATED CLOSE DATE: 08/25/2023
CLOSE PROBABILITY: Medium

TERM: 24 Months
RENEWAL TERM: 24 Months