

Next Steps - Servicing Hand-Off (Sales CRM Workflow)

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This article outlines the remaining stages following the sale of an account and the hand-off to the Operations division for servicing setup.

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](#)
4. [Closing a Sale and Lost Sales](#)

Order Processing

Pathway: [Accounts](#) > [Order Processing](#)

The Order Processing function facilitates the transition from sales to operations, enabling a thorough evaluation of new accounts and sites prior to services starting. Review the Order Processing article linked below to learn more about this tool and its functions.

The screenshot displays the Order Processing interface. At the top, there are three tabs: 'New Customer/Site', 'Service Changes', and 'Online On-Call Orders'. Below the tabs, there is a 'DIVISION' dropdown menu set to 'CORPUS' and a search bar with a magnifying glass icon and a refresh icon. The main area contains a table with the following columns: 'SUBMITTED DATE', 'SITE', 'DIVISION', and 'SALES REP'. The table lists several orders, with the last one, 'Example Site 1', highlighted in green. Below the table, there is a detailed view for 'Example Site 1' with a light green background. This view includes buttons for 'GEOCODE' and 'VALIDATE ADDRESS', and lists the following information: Class: COMMERCIAL; Service Address: 2222 Navu Cir, Corpus Christi, TX 78411, Nueces County; Billing Address: 1234 Navu Way, Corpus Christi, TX 78411; Contract Start Date: 2023-06-07; and a link to 'View Signed Agreement'.

SUBMITTED DATE	SITE	DIVISION	SALES REP
05/10/21 01:03pm	W & S Ag	CORPUS	Matt Bjorn
06/14/21 10:44am	CAT 5	CORPUS	Matt Bjorn
10/14/21 01:13pm	Taylor Renovations	CORPUS	Rob Johnson
10/21/21 10:41am	Randy Peterson	CORPUS	Rob Johnson
03/02/22 03:25pm	Best Western North Padre Island	CORPUS	Matt Bjorn
08/17/22 09:16am	Jetters Vacuum and Disposal	CORPUS	Matt Bjorn
08/17/22 09:16am	Jim Anderson	CORPUS	Matt Bjorn
08/17/22 09:16am	Mike Robinson	CORPUS	Matt Bjorn
09/19/22 01:19pm	Overland America	CORPUS	Matt Bjorn
11/01/22 10:43am	Sewer Services of South Texas	CORPUS	Matt Bjorn
06/09/23 01:06pm	Example Site 1	CORPUS	House Account

GEOCODE Class: COMMERCIAL
VALIDATE ADDRESS Service Address:
2222 Navu Cir,
Corpus Christi, TX 78411
Nueces County
Billing Address:
1234 Navu Way,
Corpus Christi, TX 78411
Contract Start Date:
2023-06-07
[View Signed Agreement](#)

Related Articles

[Order Processing](#)

Route Management - Pending

Pathway: [Operations](#) > [Route Management](#) > [Pending \(Tab\)](#)

The Pending tab in Route Management displays a list of service locations that have not been assigned to a route, this includes service locations from a recent sale. By selecting a route for a new site from this tab, it will be permanently assigned for future servicing. Review the Route Management article links below to learn more about this tool and its functions

Pending
Current
Re-Number

CORPUS

CORPUS OPEN MARKET

Commercial

Monday, Tuesday, Wed

LOAD

LOCATION	ADDRESS	QTY	SERVICE CODE	FREQUENCY	START DATE	NEW ROUTE
33346001 Hampton Inn	1234 N PADRE ISLAND DR CORPUS CHRISTI, TX 78408	1	4 Yard Trash Service 4 Yard FL MSW	1x per week W	Wed 10/05/22 Week 41 (A)	
48763001 Dunn Brothers	5678 Alameda St Corpus Christi, TX 78412-2330	1	4 Yard Trash Service 4 Yard FL MSW	1x per week T	Tue 11/15/22 Week 47 (A)	
222246001 Kwik Trip	1111 S Padre Island Dr Corpus Christi, TX 78411-4412	1	2 Yard Trash Service 2 Yard FL MSW	1x per week T	Tue 11/15/22 Week 47 (A)	
222246001 Kwik Trip	1111 S Padre Island Dr Corpus Christi, TX 78411-4412	1	6 Yard Recycle Service 6 Yard FL Recycle	Every 4 weeks T	Tue 12/06/22 Week 50 (B)	
48511001 Wildwood Flowers	2222 Agnes St Corpus Christi, TX 78401	1	2 Yard Trash Service 2 Yard FL MSW	1x per week T	Tue 11/22/22 Week 48 (B)	
428444403	4444 Saratoga Blvd	1	8 Yard Trash Service	6x per week	Mon 11/21/22	

Map Type: ROUTE

MON

DISPLAY ALL LINE OF BUSINESS

Related Articles

[Route Management Basics](#)

[Route Management - Review and Assign Stops \(Pending Tab\)](#)

[Interactive Map - Route Management](#)