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:

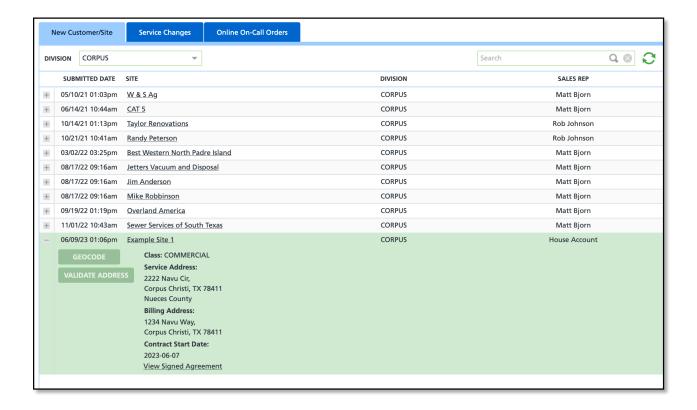
Review the following articles to better understand the sales workflow leading up to closing a sale:

- 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.



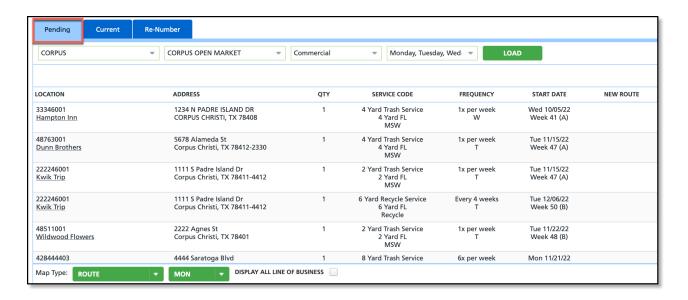
Related Articles

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



Related Articles

Route Management Basics Route Management - Review and Assign Stops (Pending Tab) Interactive Map - Route Management