

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

Last Modified on 01/24/2025 7:33 am PST

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.

New Customer/Site		Service Changes		Online On-Call Orders	
DIVISION		CORPUS		Search   	
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.

SITE	ADDRESS	QTY	SERVICE CODE	FREQUENCY	START DATE	ROUTE	SEQUENCE	WEEK OF MONTH
45170004 Mobil- 7-ELEVEN 41673	10521 Broadway St Pearland, TX 77584-8076	2	8 Yard Trash Service 8 Yard FL MSW	3x per week M,W,F	Mon 10/03/22	HOU 202	450	Posted
					Wed 10/05/22	HOU 202	370	Posted
					Fri 10/07/22	HOU 202	470	Posted
48461001 Home Goods 1132	2650 Pearland Pkwy, Suite 110 Pearland, TX 77581-5354	2	8 Yard Trash Service 8 Yard FL MSW	5x per week T,W,H,H,F				POST
					Fri 11/18/22	HOU 204	0	Posted
					Tue 11/22/22	HOU 204	0	Posted
					Wed 11/23/22	HOU 204	0	Posted
					Thu 11/02/23		24	
Thu 11/09/23	HOU 204	12	Posted					
48954002 Site_2_test	3333 University Ave SE Minneapolis, MN 55414-3325	1	15 Yard Open Top 5... 15 Yard Roll Off	1x per week F				POST
					Fri 06/30/23		0	
48957002 DaveTest2	109 Gildner St Kitchener, ON N2G 2H4	1	10 Yard Trash Service 10 Yard FL (Ser) MSW	1x per week H				POST
					Thu 07/13/23		0	

Related Articles

[Route Management Basics](#)

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

[Interactive Map - Route Management](#)