

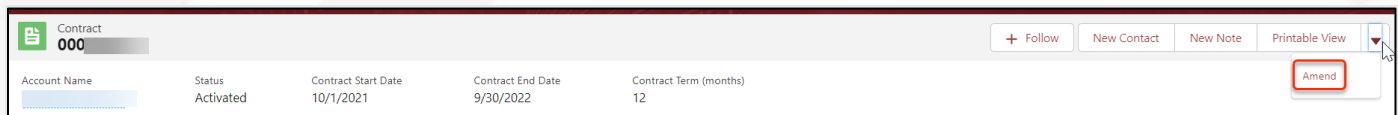
Quoting an Existing Customer

Professional Services will always amend a contract when quoting additional services for a customer. Prior to quoting services, existing customers must have an active contract and cannot be on support hold.

Amending an Existing Customer's Contract

If an existing customer would like a quote for additional services, an amendment needs to be made to the contract.

1. Locate a customer's contract in the **Contracts** section. Ensure there is a current (not expired) contract.
NOTE: If there is not a contract, Teams message Tammy and Richelle to request a contract be activated on the account.
2. Select the **Contract Number** to open the contract.
3. In the upper right-hand corner, select the drop-down > **Amend**. This creates an amendment to the contract.



Adding Products (aka Services)

To add additional service (or products) to the quote, follow the steps below.

1. Navigate to **Add Products**.
2. Select the products the customer is requesting by checking the box next to the product.
 - Products typically used in PS quotes:
 - PS – Application Consult
 - PS – Project Management
 - PS – System Consult
 - PS – Technical Consult
 - SRV-SO-PS-CPAConsulting
 - PS – Dev Services
 - PS – Executive Consult
3. After choosing your product(s), click **Select**. Products you've chosen will be displayed on screen.
4. Use the pencil icon to adjust quantity by each product, if needed.
5. Click **Save**.

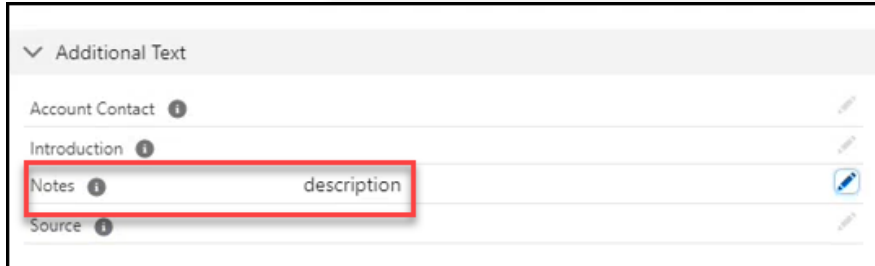
NOTE: If an Alert pops up, certain fields need to be populated before approval. Click **Continue** to go back to the quote to complete fields that are needed.

NOTE: All products for Business Management fall under the Perennial name.

If 5 hours of less, use Generating Order Acknowledgement

Services that are 5 hours or less only need an **Order Acknowledgement Form (OAF)**. Five hours or less is per each service line item.

1. Add a 1-2 sentence description of the scope of work in the **Notes** section under **Additional Text**.



The screenshot shows a section titled 'Additional Text' with a dropdown arrow. Below it are four fields: 'Account Contact', 'Introduction', 'Notes', and 'Source'. The 'Notes' field is highlighted with a red rectangular box and contains the text 'description'. There are information icons (i) next to each field name and a pencil icon to the right of the 'Notes' field.

2. Select **Generate Order Acknowledgement** in the top right.
3. Review the contents of the Order Acknowledgement for accuracy prior to sending to customer.
NOTE: If there is a blank page, let Tammy and Richelle know.



The screenshot shows a software interface for a 'New Quote Q-01531'. At the top right, there are buttons for '+ Follow', 'Edit', 'Edit Lines', 'Preview Approval', 'Recall Approval', and 'Submit for Approval'. Below these, there are tabs for 'Related' and 'Details'. On the right side, there is a 'Delete' button and a 'Clone with Related' button. The 'Generate Order Acknowledgement' button is highlighted with a red box.

4. Once you've reviewed the Order Acknowledgement form, navigate back to the quote, and click **Submit for Approval**.
NOTE: Approvals are done once a day throughout the month.



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Video for reference, found [here](#).

If greater than 5 hours, use the General OAF & SOW

Services selected that are over 5 hours need an **Order Acknowledgement Form (OAF)** and **Statement of Work (SOW)**. Over five hours per each service line item.



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Important! Any time you generate a SOW, even if not needed, it will automatically be submitted for approval. (These go to Josh Williams first)

Follow the **Generating and Verifying a Statement of Work (SOW)** document for the complete process.

Send to customer via DocuSign

Once approved, your document(s) will need to be sent to the customer via DocuSign.

1. **Important!** Regenerate the document(s) prior to sending to the customer using the drop down for Generate Order Acknowledgement or Generate OAF & SOW.
2. Click **Submit to DS** (DocuSign) in the upper right-hand corner.
3. Follow the **DocuSign process**.

Close the Quote

After the document is fully executed and both the customer and Alison have signed, the quote will automatically close if all required fields are completed.

If all required fields are **incomplete**, the opportunity will not close automatically.

1. Go back to the Opportunity on the account.
2. Click through each section across the top and select **Mark Stage as Complete**.
NOTE: If you receive an error, complete those sections to move forward to the next one.

The screenshot shows a CRM interface for an opportunity. At the top, there are several action buttons: '+ Follow', 'Create New Quote', 'Edit', 'Clone', 'Submit for Approval', 'DocuSign', 'Send with DocuSign', 'New Event', 'New Note', and 'Configure'. Below these buttons, the opportunity details are displayed: Account Name (Xenoge Technologies Test), Close Date (4/4/2023), Amount (\$1,450.00), and Opportunity Owner (Tammy Narowski). A progress bar at the bottom shows the stages: 'Scheduling Discovery Call' (selected), 'Awaiting Discovery Call', 'Scheduling Demo', 'Demoing', 'Quoting', 'Negotiating', 'Verbal Commitment', 'Closed', and 'Mark Stage as Complete' (with a checkmark).

FYI on required fields

- Type = Existing Business – Upgrade
- Lead Source = Existing Database
- Sub Lead Source = Other

Quoting a Customer (Professional Services)

