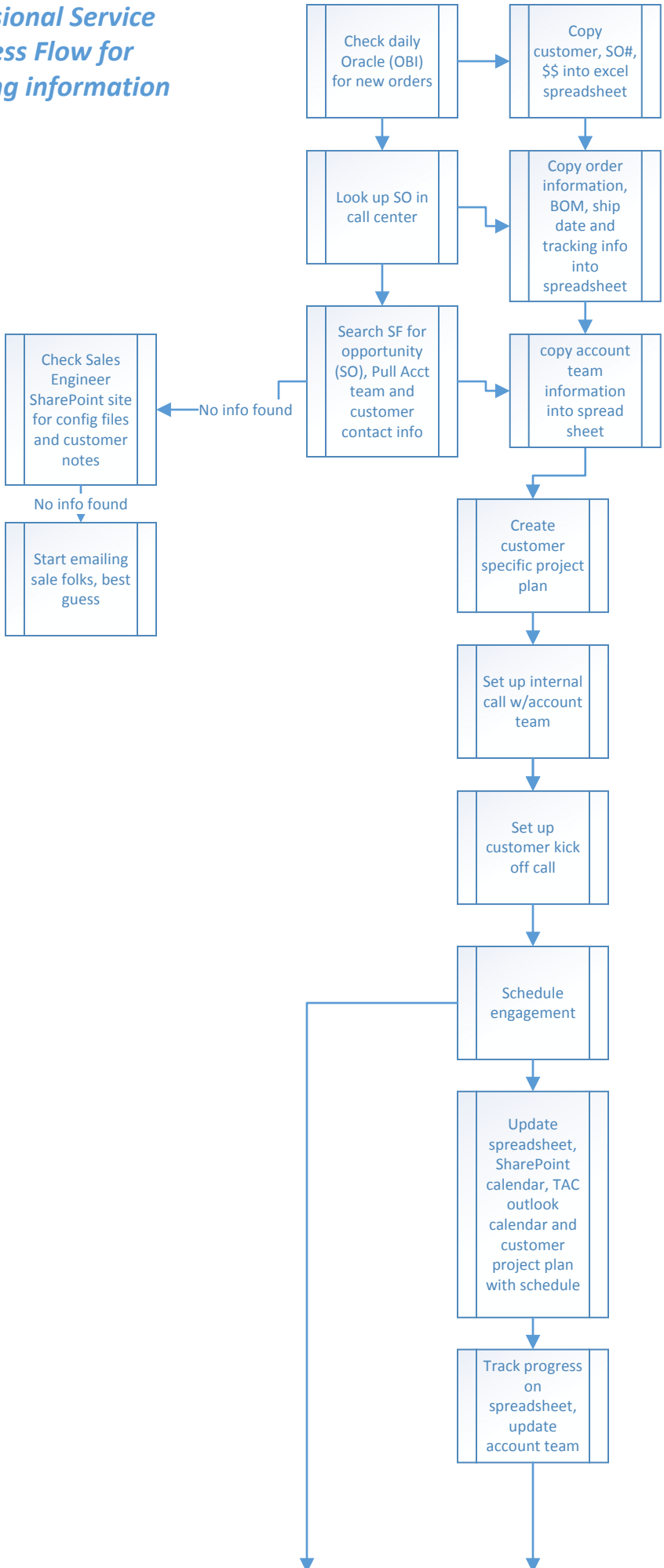
Professional Service Process Flow for gathering information

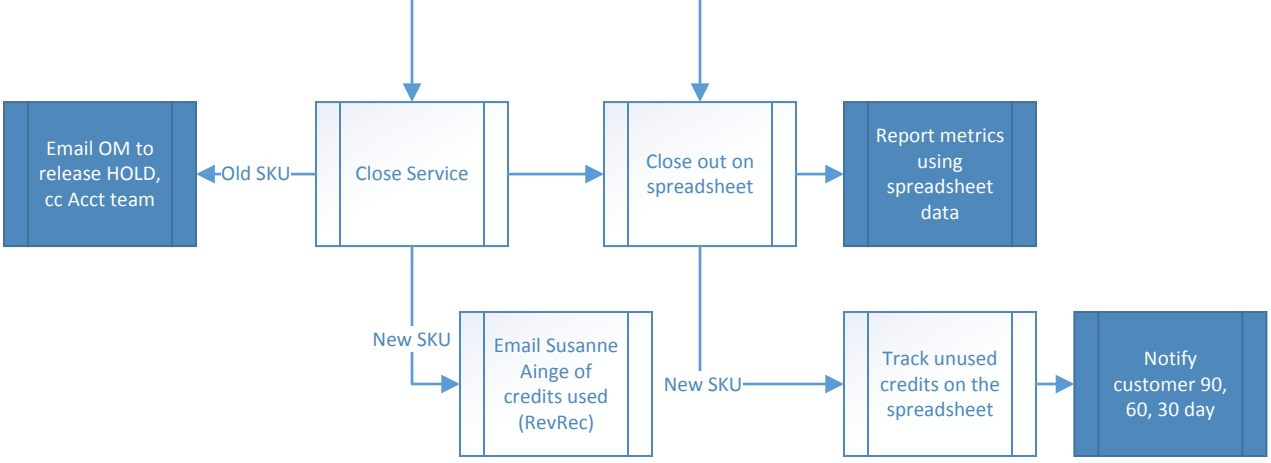


Information Needed

- Customer name
- Customer contact
- Sales channel
- Sales Order (SO#)
- Account Team
- Order amount $$
- Booked date
- Model Type
- Description of Service

Other

- Dashboard
- Metric
- Tracking credits by booked date, expires after 1 year
- Tracking credits used and un-used


Email OM to release HOLD, cc Acct team
Old SKU
Close Service
Close out on spreadsheet
Report metrics using spreadsheet data
New SKU
Email Susanne Ainge of credits used (RevRec)
New SKU
Track unused credits on the spreadsheet
Notify customer 90, 60, 30 day