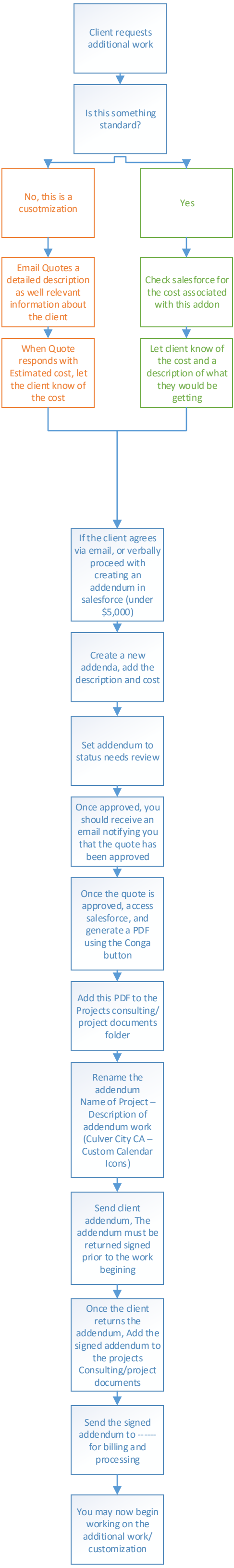
Client requests additional work
Is this something standard?
No, this is a cusotmization
Yes
Email Quotes a detailed description as well relevant information about the client
Check salesforce for the cost associated with this addon
When Quote responds with Estimated cost, let the client know of the cost
Let client know of the cost and a description of what they would be getting
If the client agrees via email, or verbally proceed with creating an addendum in salesforce (under $5,000)
Create a new addenda, add the description and cost
Set addendum to status needs review
Once approved, you should receive an email notifying you that the quote has been approved
Once the quote is approved, access salesforce, and generate a PDF using the Conga button
Add this PDF to the Projects consulting/ project documents folder
Rename the addendum Name of Project – Description of addendum work (Culver City CA – Custom Calendar Icons)
Send client addendum, The addendum must be returned signed prior to the work begining
Once the client returns the addendum, Add the signed addendum to the projects Consulting/project documents
Send the signed addendum to ------ for billing and processing
You may now begin working on the additional work/ customization