TrackStreet - Create Deal guide

AE should keep track of their open deals regarding close dates because any communication logged after a close date will not be recorded on the deal page.

- Select Add deal on Company page
- Create New Deal
    - Must go in Linear Order 2>3>4>5
    - Be sure to check "Add Timeline Activity to Deal" (All Time)
- 2 - Sales Accepted
    - Amount - Only Recurring Annual Rate
    - Close date - 90 days, unless they say it will take longer
    - Create date - Day created
    - Deal Type - New Business
        - Add-on Business for Farmers
    - BDR - Delete
    - **Source**: Create explanations for each
    - Probability: Discretion of AE
        - 40-60 to start
        - 100 to "5 Closed Won"
    - Select the modules they are interested in
        - Even if proposal has additional modules, only add what you think they will have
    - UPC Swap Fee
        - Column C - $ Value per Sku: "$10"
    - Setup Fee
    - Payment Terms

- 3 - Made shortlist, after ending the proposal. Sean will send a proposal to AE, then AE changes Deal Stage to 3.
- 4 - Contract sent. Sent out Sales order for Andrew and customer's signature.
- 5 - Closed Won - Accounting and CSM notified
    - Final Review
        - Confirm UPC count matches
        - Total Amount
        - Setup Fee
        - Payment Terms
        - Deal dates
        - Swap fees
        - Primary Product User
        - Primary Sales Contact

Company Owner Tasks Triggered:
- Set Primary Product User
- Compare executed contract to Deal in Hubspot to make sure details match
- Set fields Industry and Industry (CSM)

Add contract to folder in Sales drive

Add Agency Folder in Drive?

HubSpot, recording agency associated companies

What other questions should be asked to fill in a contract?
- Payment Terms
- Payment Type
- Others?
- What are your top 10 problem sellers you want identified?