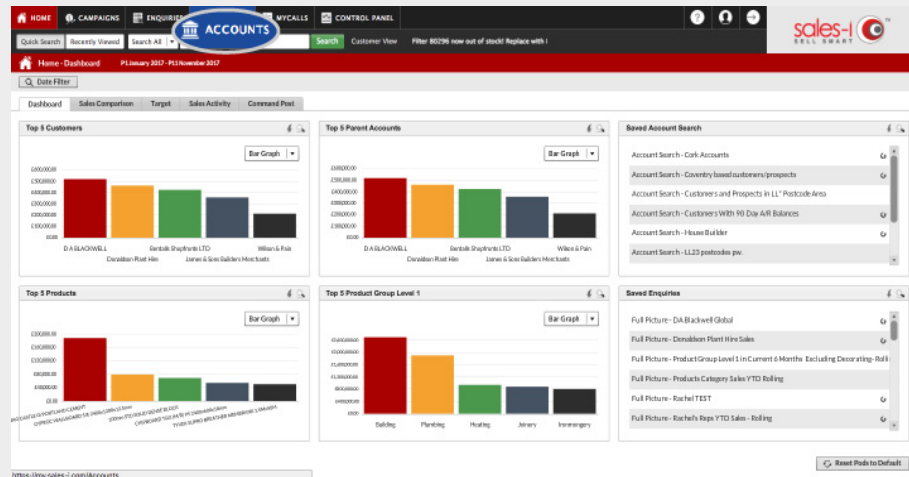


HOW TO ADD A PROSPECT

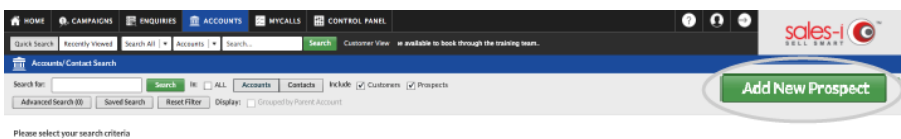
Adding a potential customer to sales-i is the perfect way to ensure you track any and all conversations you're having with them and set you up for future success when you win their custom.

01 Click Accounts.



02 Click Add New Prospect.

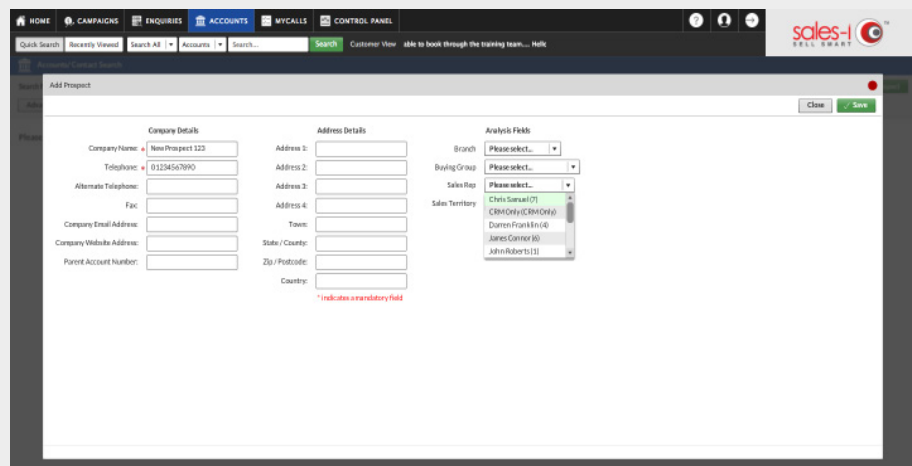
Top tip: It's a good idea to search for this prospect first to check they don't exist on sales-i already.



03 Fill in the necessary details (these can be edited at a later date).

Mandatory fields are indicated with an * asterisk.

Note: if you are restricted by Sales Rep code – make sure you add this prospect to your own code.



Company Details

Company Name:

Telephone:

Alternate Telephone:

Fax:

Company Email Address:

Company Website Address:

Parent Account Number:

Address Details

Address 1:

Address 2:

Address 3:

Address 4:

Town:

State / Country:

Zip / Postcode:

Country:

*Indicates a mandatory field

Analysis Fields

Branch:

Buying Group:

Sales Rep:

Sales Territory:

Close

04 Click Save.

05 A new browser tab will open showing this new prospect's Record Card.

From here you can make a note of your calls/conversations with this prospect.

Visit <https://support.sales-i.com/how-to-add-a-note/> for our guide on how to do this.

New Prospect 123 (P: 0000004456)

Customer Details

Contacts

Call History Notes

Documents

Opportunities

Customer Credit Information

Key Facts

Projects

HDP

checkpoint keypoints

ryedale

ollie

Customer Details

Account Number: P-0000004456

Tags:

Address:

Sales Rep: Chris Samuel

Telephone number: 01234567890

Telephone number (alternate):

Fax number:

Company email:

Company web address:

Convert a Prospect to a Customer

If you wish to convert a prospect to a customer, increase the Searchbox to Full for Customer Account Number. Then highlight the account number and click Convert. This will transfer all opportunities and notes to the customer account. It will also create a link in the Linked Prospects section of the customer's CRM. You can view the only prospect's CRM.

Account Number	Customer Name	Date Created
12345	iboot	Fri May 11 10:42:13 GMT-0100 2006
C01123	ASTON HALL NURSING HOME	Fri Sep 5 11:06:45 GMT-0100 2006
C01122	BRYNGWYN ELECTRICAL	Fri Sep 5 11:06:45 GMT-0100 2006
C01230	A W EVANS	Fri Sep 5 11:06:45 GMT-0100 2006
C01232	A BENKIN	Fri Sep 5 11:06:45 GMT-0100 2006
C01231	EL BROOKHAM	Fri Sep 5 11:06:45 GMT-0100 2006

06 When this customer starts spending with you, they will appear as a customer in sales-i.

Your power user can merge the prospect with the customer to ensure none of your hard work, time and effort are lost.

Visit <https://support.sales-i.com/how-to-convert-a-prospect-to-a-customer/> for our guide on how to do this.

VISIT OUR SUPPORT SITE

Don't forget to visit our support site online to view sales-i how to's, tips, tricks and best practices.

<https://support.sales-i.com>