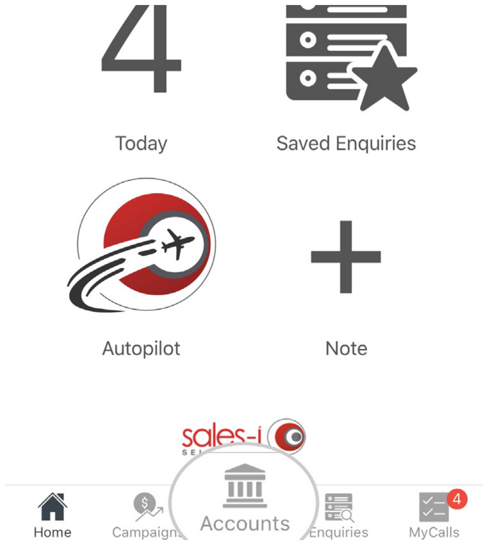
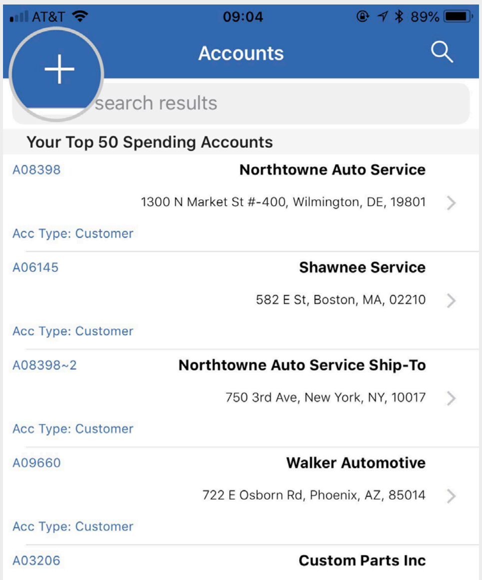
HOW TO ADD A PROSPECT - APPLE

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 business.
Pease note: This setting can only by updated/edited for contacts manually added onto sales-i, and cannot be changed for contacts imported from your invoicing system.
Top tip: It's a good idea to search for this prospect first to check they don't exist on sales-i already.

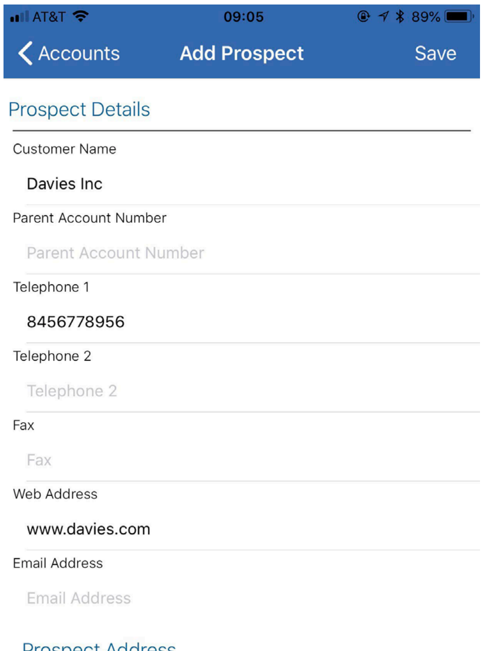
01 From the sales-i home page, tap **Accounts.**

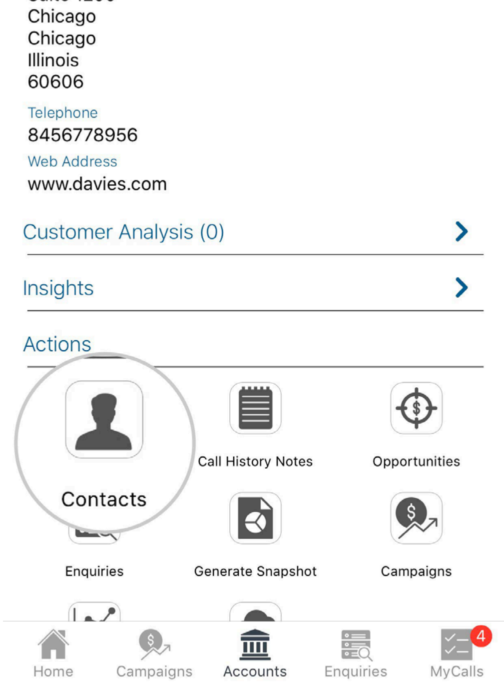




02 Tap the **+ icon** (top left hand corner).

03 Enter all relevant details for the account and tap **Save** (top right hand corner).

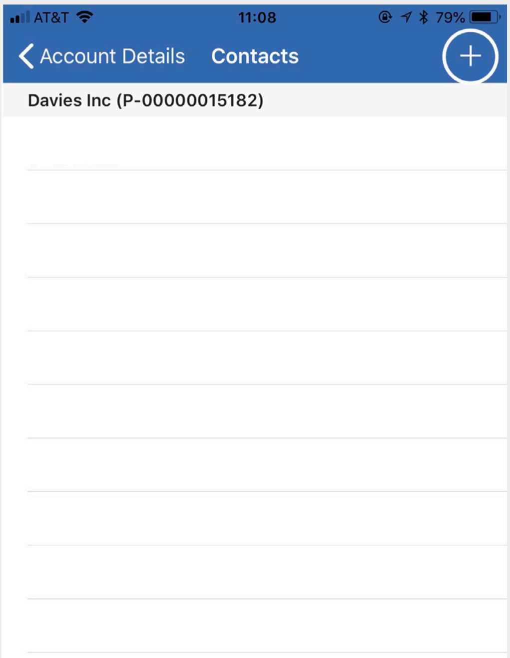




04 OPTIONAL

Now you have saved details of your prospect account, you may wish to enter details of any contacts related to this account.

To do so, Select **Contacts** from the accounts Actions tab.



05 OPTIONAL

Tap the **+ icon** (top right hand corner).

06 OPTIONAL

Next, enter your contact's details.

You can do this manually or if you already have contacts on your iPhone or iPad, you can upload their details by tapping the **Upload icon** (located next to the Save Icon in the top right hand corner).

Once you have entered all relevant details, tap **Save**. (Right hand corner).