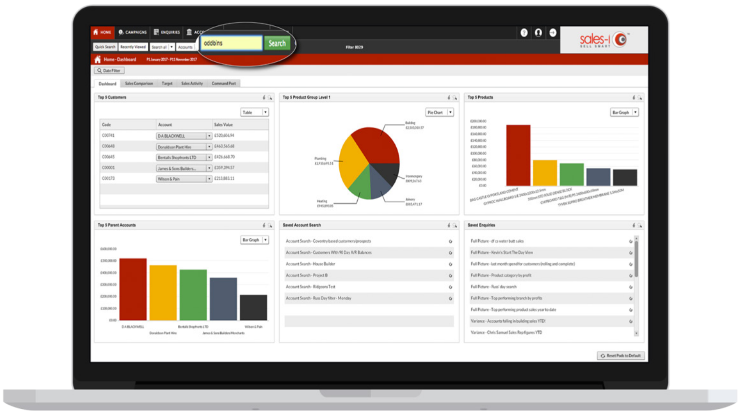
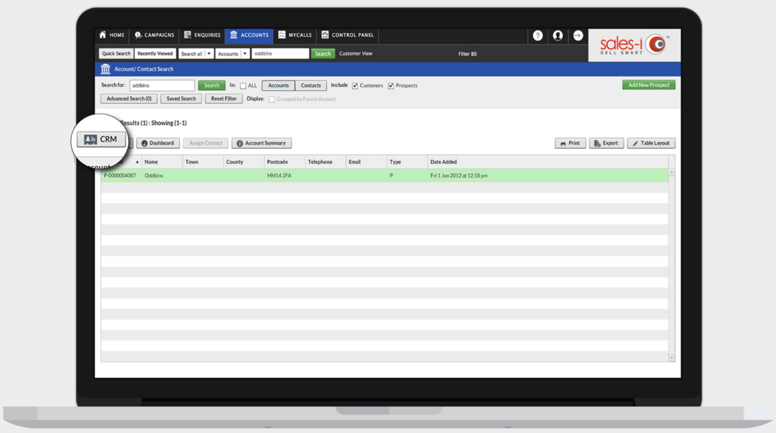
HOW TO CONVERT A PROSPECT TO A CUSTOMER

When a prospect takes their first order, your back office system will generate a new customer account in sales-i. This will be linked to sales invoices. To ensure that all contacts, notes and opportunities are preserved, you're able to merge the prospect and customer account record cards. Here's how.

Note: T``his is a power user function, but permission can be given to other users if necessary. Contact support for details.

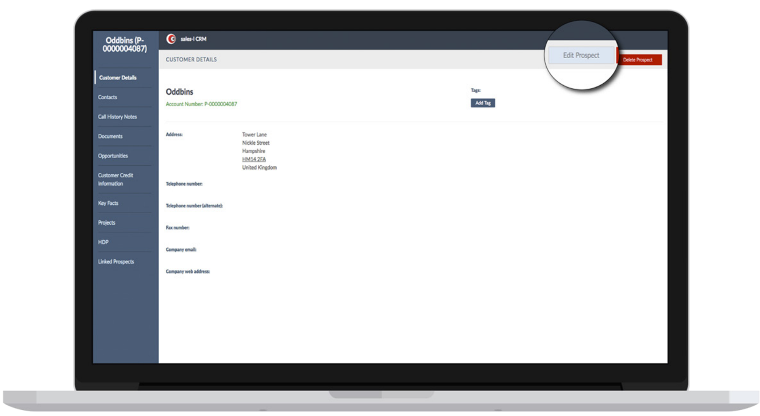
01 In the Search bar at the top of the home screen, enter the name or account number of the prospect you wish to convert and hit **Search**.

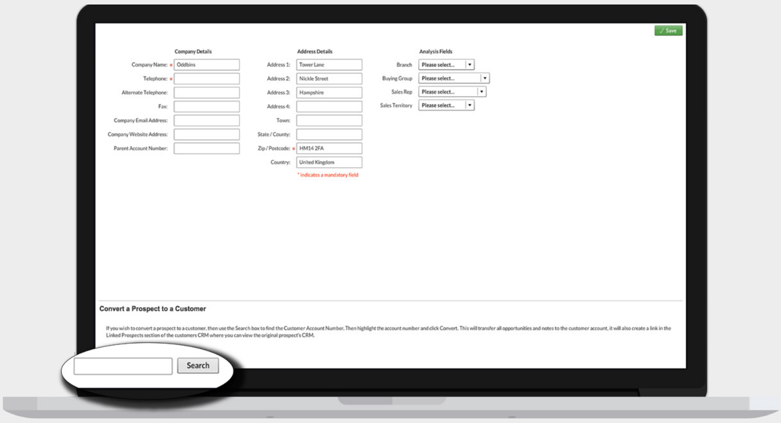




02 From the search results, click the prospect's account so that it is highlighted green and then click **CRM.**

03 In the prospect's Record Card, in the top right corner, click **Edit Prospect.**





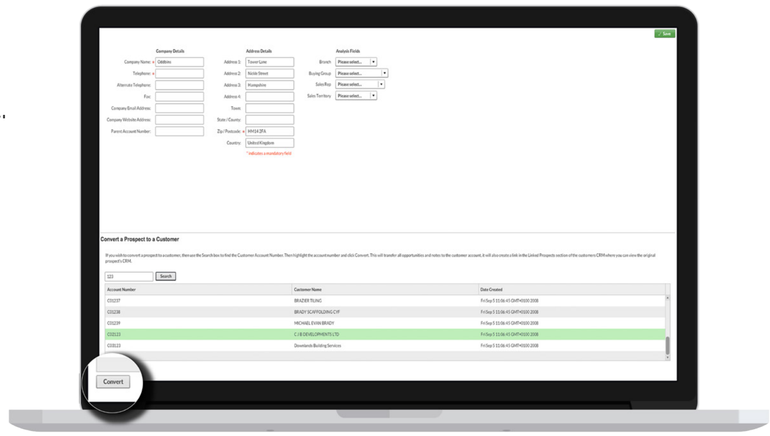
04 A new window will now pop up. In the bottom left, you'll see a search bar: this is the prospect/customer convert facility.

Enter the customers unique account number here and hit **Search.**

05 In the results, click on the account you wish to convert and then click **Convert**.

The prospect and customer cards will now be merged.

Please note: Now when you use the sales-i search facility, only the customer will be searchable.



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https://support.sales-i.com