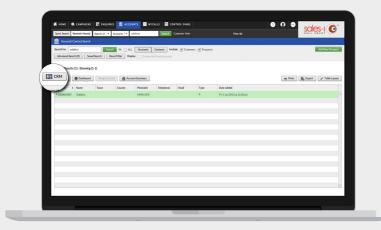
HOW TO CONVERT A PROSPECT TO A CUSTOMER

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**.

Exck Search Reservy Viewed	Journ 207-FUlf-moder 207		*****			
Q Date Filter	_					
	n Target SalesActivity Command/Red					
Top 5 Quetomers		4.9	Top 5 Product Group Level 1	65	The S Products	
		Ten I				
1000		Table .		PieDat •	COLUMN .	Bar Graph *
Code	Account Sales Value			GRADE P	CAMA CAMA	
CIEPIS	O A BLADIMELL . CIZLADLIN				6486X	
CINHI CINHI	Donation Part Her + 044151168				62.86.8 (20.96.9	
CINES	Botah Buytrash 170 + (431.661.70		Resting REVENUE		MARK NO.	_
CR021	Lames & Sone Bulders				INDER .	
CREVI	When & Pain (*) CELURES			00(21/3)	LINCK LINCK	
			L L	No.	EX MCGRADOOLARCORE CRECERIZARIA DESCRIPTION CRECERIZARIA DESCRIPTION CRECERIZARIA DESCRIPTION CRECERIZARIA DESCRIPTION	E SERVER AND AND A SERVER AND A S
				0654529	Conscience Conscience	al factories
Top 5 Parent Accounts		45	Served Account Search	4.5	Served Empirica	6
		BerGraph (+	Acaust Send-Coverty beef outpren (project)	0	Tel Para-d'o vetrobet véo	
Difference -		an order +	Acard Sards-Contry Sector Springers	0	Fail Polant - Bio water but Laks	0
CHARM BEING			Access from Construction Construction		Fail Polare last month genetiter customerolinoling and complete	
00000			Acoust Surds-Reint B	0	Fall Row-Podul uterry learning	
100.00.00				0		0
120.00.00			Acourt Search - Ridgoon Test	0	Full-Pohere-Basi day search	0
			Account Search - Russ Day Start - Manday	0	Fall Picture - Top performing branch by profits	0
CB/KO					Fall Polane-Top performing product sales year to date	
Dist. Contraction	Intel Supervice	Viscola			Variance - Accounts billing in building unles YTD	ŵ
	lealter/fattile lancel.See Builder/As	dun			Variance-Onto Samuel Latos Rop Agares 192	8
						G. ResetPath to Defau



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.

Oddbins (P- 0000004087)	C sales I CRM		
	CUSTOMER DETAILS		Edit Prospect Deex Propert
Customer Details			
Contacts	Oddbins Account Number: P-000004687	Add Tag	
Call History Notes			
Documents	Address: Tover Lane Nickle Street		
Opportunities	Hampshire HM14.27A		
Customer Credit Information	United Kingdom Telephone number:		
Key Facts	Telephone number (ulternate)		
Projects	Fax number:		
HDP	Company enails		
Linked Prospects	Conjuny we address		

Concertion =		Company Details	Address Details		Analysis Fields	
Amount happens (b a Catatomer	Company Name:	Oddbins Addres	s 1: Tower Lane	Branch	Please select	
	Telephone:	Addres	s 2: Nickle Street	Buying Group	Please select	
Comerci a Prospect is a Contenser Comerci a Prospect is a Contenser Comerci a Prospect is a Contenser	Alternate Telephone:	Addree	s 2: Hampshire	Sales Rep	Please select	
Comment & Proceed to a Cultomer Provide To a Cultomer Provide To a Cultomer Provide To a Cultomer Comment & Proceed to a Cultomer To advance and the provide To advance and the p	fac.	Addres	s4:	Sales Territory	Please select.	
Perek Associations 2 Jan Houses (1992 Marcellande) 2 Service 1	Company Email Address:	To 10	Arc			
Convert a Propert to a Contomer Convert a Propert to a Contomer	Company Website Address:	State / Cou	the last the second sec			
"-induces and even to a Contenter Comment & Presigned to a Culturer	Parent Account Number:	Zp/Postc	de: • HM142FA			
Convert a Proppet to a Customer		Court	try: United Kingdom			
If you with to convert a excepter to a customer, then use the Search box to find the Customer Account Number. Then highlight the account number and cick Convert. This will transfer all eccenturilies and notes to the customer account. It will also ensult a link in			* indicates a mandatory field			
If you with becaused to a customer, then use the Sourch box to find the Customer Account Number. Then highlight the account number and cick Convert. This will transfer all opportunities and notes to the customer account. It will also ensult a link in						
If you with to convert a response to a customer, then use the Sparch basis of red the Customer Account Number. Then highlight the account number and click Convert. This will transfer all eccenturilies and notes to the customer account. It will also create a link in						
If you with to convert a response to a customer, then use the Sparch basis of red the Customer Account Number. Then highlight the account number and click Convert. This will transfer all eccenturilies and notes to the customer account. It will also create a link in						
If you with to convert a response to a customer, then use the Sparch basis of red the Customer Account Number. Then highlight the account number and click Convert. This will transfer all eccenturilies and notes to the customer account. It will also create a link in						
If you with to convert a response to a customer, then use the Sparch basis of red the Customer Account Number. Then highlight the account number and click Convert. This will transfer all eccenturilies and notes to the customer account. It will also create a link in						
If you with to convert a response to a customer, then use the Sparch basis of red the Customer Account Number. Then highlight the account number and click Convert. This will transfer all eccenturilies and notes to the customer account. It will also create a link in						
If you with to convert a response to a customer, then use the Sparch basis of red the Customer Account Number. Then highlight the account number and click Convert. This will transfer all eccenturilies and notes to the customer account. It will also create a link in						
If you with to convert a response to a customer, then use the Sparch basis of red the Customer Account Number. Then highlight the account number and click Convert. This will transfer all eccenturilies and notes to the customer account. It will also create a link in						
If you with to convert a response to a customer, then use the Sparch basis of red the Customer Account Number. Then highlight the account number and click Convert. This will transfer all eccenturilies and notes to the customer account. It will also create a link in						
If you with to convert a response to a customer, then use the Sparch basis of red the Customer Account Number. Then highlight the account number and click Convert. This will transfer all eccenturilies and notes to the customer account. It will also create a link in						
If you with to convert a response to a customer, then use the Sparch basis of red the Customer Account Number. Then highlight the account number and click Convert. This will transfer all eccenturilies and notes to the customer account. It will also create a link in						
If you with to convert a response to a customer, then use the Sparch basis of red the Customer Account Number. Then highlight the account number and click Convert. This will transfer all eccenturilies and notes to the customer account. It will also create a link in						
If you wish to convert a prospect to a customer, then use the Search how to find the Customer Account Number. Then highlight the account number and cick Convert. This will transfer all opportunities and notes to the customer account, it will also create a link in						
If you wish to convert a prospect to a customer, then use the Search box to find the 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	Convert a Prospect to	a Customer				
Linked Prospects section of the custamers CBM where you can view the original prospect's CBM.	If you wish to convert a proso	set to a customer. Then use the Search box to find the	Customer, Account Number, Thum high	sight the account number	er andråd Ganara, Timul Thankov at aggenvalles and values the customer annuar. It will	lise cruate a Tekcin th
	If you wish to convert a proso		Customer Account Number, Tean high major (C. C. K.	Night the account number	er particle Ganety, This alterative all approximite and waters to be continent ansatzer, it will all	Iso create a Tekin th
	If you wish to convert a proso	set to a customer. Then use the Search box to find the	Castoner Account Number, Then Night response (CDM.	light the account numbe	er and de Canada. This altitudes al approaches and notes with calabour actions. It will a	iso cruate a link in th
	If you wish to convert a proso	ict to a customer. then use the Search box to find the	Curtomer Account Number, Then high sequent (CBM,	sight the account number	er pedide Group. The off tracket of super-trains and white the customer assumer, it will a	iso create a link in th

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.

	Company Details		Address Details		Analysis Fields				
Corpany Name	Others	Addres 2	Tourism	Banch	Picerselet. •				
Trighten	•	Addres2	Nickle Street	BaingGroup	Picer orbit.				
Alternata Telephone		Addres 2	Hamphire	Seleito	Pices select.				
Fac		Addres-4		Sales Tentery	Pisseselet.				
Company Enal Address		Town							
Company Website Address		State / County:							
Parent Account Number:		Zp/Psenade	104542FA						
		Country:	United Kingdom						
			"indicates a mandatory field						
Convert a Prospect to	a Customer								
		tens to find the Cust	tamp Account Mamber, There	higtäglit fre assand nar	nher and clob Convert. This will t	ander all apportantics and robust	to the container account	4. In the events and inter Galaxies and we address of the solutions of the solutions.	nbey you can des vie original
Fyoyabhtsoowert.aprog propertyCIM	end to accelerate. Den use the Search	lan to find the Cast		tigtlight the account num	nher and clot Convert. This will t	ander all apportantics and optics		n, k mil sku vester fak i der (Met Progets setter of Fer outer ver SDM Der Owner	nhers yes can den the original
Pyouvidation converting program	end to accelerate. Den use the Search	lass to find the Cust			nter and clob Convert. This sail is	ander all apportunities and with t			nhere yes can den the ariginal
Fyseveldete convert a prog progest's CIM. 123 Account Number	end to accelerate. Den use the Search	tens to find the Cust		Castorno Name		under all reportantics and notes t		Gree Created	uberges un des Re ariginal
Freenikhospeerkaperg property DM. 202 Account Number Cot107	end to accelerate. Den use the Search	ten to fiel the Cust		Castomer Name BRAZER TUNG	Cfi	under all reportanties and orders		Date Owned Fr:Sty 5 11.0x +5 CMTH 200 2008	nhưn yay can den the scipine
Prevailship convert a prep property CBM. 122 Account Number CELLIT CELLIT	end to accelerate. Den use the Search	ten te find the Cust		Catomer Name BAI2ER TUNG BRIDT SCHFFOLDING	Crif F	ander di apportunites and relas ti		Data Orosted Fe Sty 5 11:06 = 10 APR 4220 2020 Fe Sty 5 12:06 = 10 APR 4220 2020	uberygs samlen fle ørjed
Preventific convert a prep property CISA. 122 Account/Kumber CEC127 CEC128 CEC129	end to accelerate. Den use the Search	ten to find the Cost		Cadomer Name BRAZER TUNG BRIDT SCAFFOLDING MICHIEL EVINIBRADY	ся к 170	ander all apportantics and veites t		Data Grand Fe Seg 5106 e1 OH-000 2008 Fe Seg 5106 e1 OH-000 2008 Fe Seg 3106 e1 OH-000 2008	

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

