

## **CREATING A NEW PROSPECT-CUSTOMER RECORD AND ADDING CONTACT INFO**

Prospects are potential Customers and Vendors to Greenmaker. A new Prospect-Customer or Prospect-Vendor will not be converted to a Customer or Vendor Account and set up in ICS until a WPCRM Prospect record is established and a Task Activity record, code CR, is assigned to a specific Greenmaker staff. Once the Prospect is verified and approved, a Customer or Vendor record is created in ICS. Entry for conversion for vendor done by Hugo Chang :[hchang@bullergrp.com](mailto:hchang@bullergrp.com) and conversion for the customer done by Liz Simmons: [esimmons@Greenmakerusa.com](mailto:esimmons@Greenmakerusa.com) . Must receive prior approval by Admin: [seeta@bullergrp.com](mailto:seeta@bullergrp.com)

### **CREATE NEW PROSPECT-CUSTOMER:**

When creating a brand new Prospect-Customer, it is important to note, the Account Type, Name, and Company entry boxes should be filled in at the time the prospect-customer record is created. All other information can be entered prior to converting the record to an actual Customer Account. **It is also important to make sure the Prospect-Customer is not already set up in the system.**

1. From Mission Central Dashboard, click New Prospect Quick Link button or from Accounts tab, click Add New Account button. The Account Info screen will be displayed.
2. NOTE: Before any new Prospect-Customer is created in WPCRM, always be sure to verify the prospect has not already been set up. This can be done with the help of the system. As you type information in each field, a message will appear , :”Checking for duplicates...”. If a potential duplicate exists, the system will return a message as follows: “One or more similar accounts already exist in WPCRM. Please ensure the new account is not a duplicate”. A list of potential duplicates will also be displayed. If the Prospect-Customer being entered is in fact on the existing record list, click in the radio button for that record. Then click on Switch To An Existing Account button. A message will display letting you know anything you had entered will not be saved and asks if you want to continue. When you click OK, the system opens the existing record and displays it. If the list does not display the record you are entering, continue to add information in each of the entry boxes, paying attention to the existing record list as you go.
3. Click in the Account Type field and select Prospect-Customer from the drop-down list.
4. Click in Name entry box and type the company name using standard spelling rules ( use name – ie: Greenmaker Ind. or ABC Supply). Remember, this is the point a which you must begin paying attention to whether the system is finding duplicate or not. Review any existing record as the list is generated.
5. Fill in any other entry box with information known at this time.
6. Click in Company entry box and select the appropriate organization ( ie: 3700-Greenmaker Ind.)
7. Continue filling in all known information until done.
8. Click Save button. The Prospect-Customer record will be displayed.

9. To add a Note:

- Click Add New... button
- Select Note from drop-down list
- Type note in Note entry box
- Click Add button
- Click OK

10. To attach a document to a Prospect-Customer record (such as a Credit Application)

- Click Add New... button
- Select Attachment from drop-down list. The New Attachment window is displayed
- Click in Contact entry box and select appropriate Contact from drop-down list
- Click on Choose File button
- Locate file to be attached on Desktop or in a folder.
- Double click on the file
- Click Upload button. A message appears confirming your attachment has been uploaded
- Click Add Another Attachment or Close

11. To Add a Contact:

- Click Add New button
- Select Contact from drop-down list. Contact entry boxes will be displayed in the right pane
- Type the first and last name in Contact Name entry box
- Enter contact's title in the Job Title entry box
- Enter email address in Email entry box
- Enter contact's office phone # and extension in Work Phone entry box
- Enter contact's cell phone # in Mobile entry box
- Enter any important information regarding the contact in the Notes entry box
- Click OK

CONVERT PROSPECT-CUSTOMER TO A NEW CUSTOMER ACCOUNT:

Once a Prospect-Customer enters an order with us, their record must be converted from a Prospect record to an Account record in WPCRM and ICS. You must pull up their Prospect-Customer record and make sure all information has been captured.

1. Click on Accounts tab
2. Type Prospect-Customer's name in the Search Accounts entry box
3. Select the Prospect-Customer you want to convert from the list of search results. The Prospect-Customer record will be displayed
4. Click on the Edit tab and enter all information for each entry box. All are required for the conversion to occur.

5. Create Task at this point for person to set up vendor or customer.
6. If it is a COD- customer add note.