WPCRM

CUSTOMER / VENDOR CONVERSION REQUEST

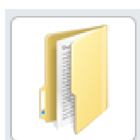
For new Customer and Vendor Accounts, a Rep enters a Prospect (Customer or Vendor) and an associated Contact/s into WPCRM.

From the Account (or Account Edit or Add) screen, the Rep clicks a button to Request Customer or Vendor Conversion. An Activity Task is automatically sent to the Credit Department (for Customer) or the AP Department (for Vendor). **This document covers the Request procedures.**

The Conversion process is performed by a Marjam Administrator, who enters the Account in SX.e GUI and changes the Account Type in WPCRM from Prospect to Customer or Vendor with the assigned SX.e Account Number. The Rep on the WPCRM Prospect/Customer record becomes the Customer Account Rep in SX.e GUI.

All records are based from an **ACCOUNT**. An Account's **ACCOUNT TYPE** can be:

- **Customer Prospect** (potential)
- **Customer** (active in SX.e)

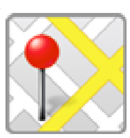


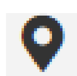
Customer Prospect / Customer icon

- **Vendor Prospect** (potential)
- **Vendor** (active in SX.e).

Vendor Prospect / Vendor icon

- **Ship To** (active in SX.e)





Ship To icon

CONTACTS are representatives of the Account.

Contact icon.

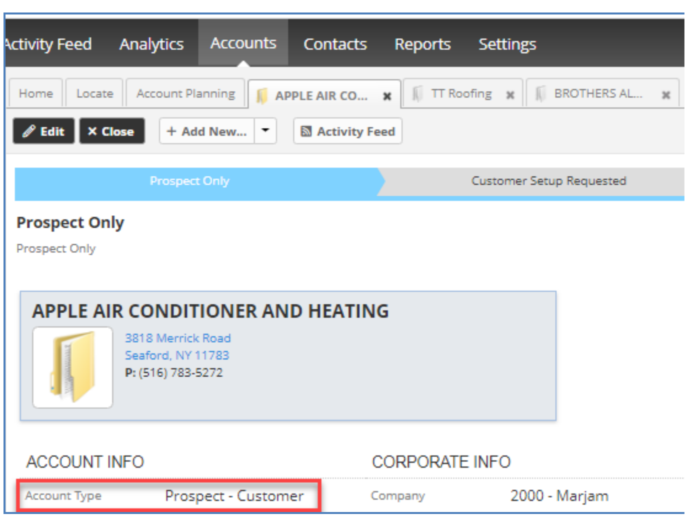
ACCESS and VERIFY ACCOUNT

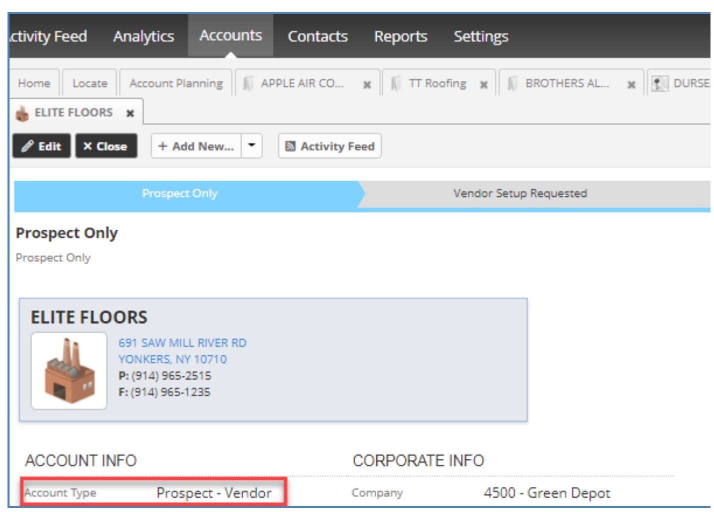
- Access Customer or Vendor Prospect record you need to convert.
  - To review Customer Prospect entries and to convert to a Customer, go to page 3.
  - To review Vendor Prospect entries and to convert to a Vendor, go to page 8.

If needed, refer to Accessing an Account and Contact in the WPCRM section in the Reference and Training Center (off Inform Portal) for access/search instructions.

If you are adding a Prospect or a Contact, Note, Activity or Attachment to the Account, refer to Adding an Account and Contact in the WPCRM section in the Reference and Training Center (off Inform Portal).

> Although WPCRM warns of duplicate records when adding a Prospect, you should always perform a search of an Account as there could be a record under a different spelling.
>
> Search by phone number, different spellings, Contact, etc.
>
> In addition, always perform a search of Contacts that will be added to your Prospect, as a person may have been with another company (will not appear as duplicate when entering new Prospect). If the Contact exists with another Account, check Contact Notes and access that Account record and verify if any issues have taken place.
>
> If you have any concerns regarding an Account or Contact, contact the Credit Department.





PROSPECT CUSTOMER ENTRIES and CONVERSION

Review Account and if needed, click **Edit** to modify.

Entries with a down arrow will display a drop down list upon clicking in it. You can scroll down or type information to advance listing. Click a record to select. You can click a check box to insert a check mark where necessary. As you enter data, WPCRM will advise if similar Accounts already exist.

Entries in bold (below) are required for Customer conversion, which is covered on page 5.

- ACCOUNT INFO: **Account Type (Prospect Customer), Business Name** (avoid using special characters, such as period, comma, dash, colon, semi-colon and apostrophe; ampersand (&) is acceptable), **Address**, **Phone Number**, Fax.

- CORPORATE INFO: **Company, Branch, President** (can add), Website, **AP Contact/email** (can add). Do not add AR Contact.

  If the AP Contact is the same as the President, click **Same as President/Owner** in Contact entry.

  Obtain accurate Owner and AP Contact Names, email addresses, all phone (office and cell) and fax #'s, and Job Title (e.g., owner, AP clerk, estimator, project mgr). You must enter all other Contacts and this same information for all other Contacts you are aware of **BEFORE** requesting a conversion.

- ACCOUNT MANAGEMENT TEAM: **Outside Rep (you default), Credit, Regional, Branch, Pricing Manager** appear based on Branch entry.

- ACCOUNT NOTE

- ADDITIONAL INFO**: Source** (how Marjam Rep became aware of Prospect), **Customer Type** (company's primary business; e.g., general contractor, sub contractor, EIFS, Retail, Institution)**, Competition** (check box – who are they currently buying from), Number of Employees, Expected Revenue, Annual Sales, Does Not Have a Fax

- PROSPECT CONVERSION: Order Pending, **Credit Line, Customer Terms**

Click **Save** button.

Duplicate Accounts

You are responsible for making sure you do not enter duplicate Prospect/Account records. This MUST be done BEFORE sending your Customer Setup Request to Corporate.

- WPCRM does not start showing you the potential duplicates until you have completely entered the Business name and have clicked in the next entry box. It is your responsibility to review the yellow highlighted list of possible duplicates to be certain you are not entering a duplicate record.

- WPCRM displays possible duplicates for you to review, but it will NOT stop you from entering a duplicate record. Possible duplicates REQUIRE your review and judgment.

- Best practice to avoid duplicates is to do a Quick Search on Business Name, Owner or Primary Contact Name, and Phone #'s. Perform a search of an Account under a different spelling.

- Perform a search of Contacts that will be added to your Prospect, as a person may have been with another company (will not appear as duplicate when entering new Prospect). If the Contact exists with another Account, check Contact Notes and access that Account record and verify if any issues have taken place.

- If you have any concerns regarding an Account or Contact, contact the Credit Department.

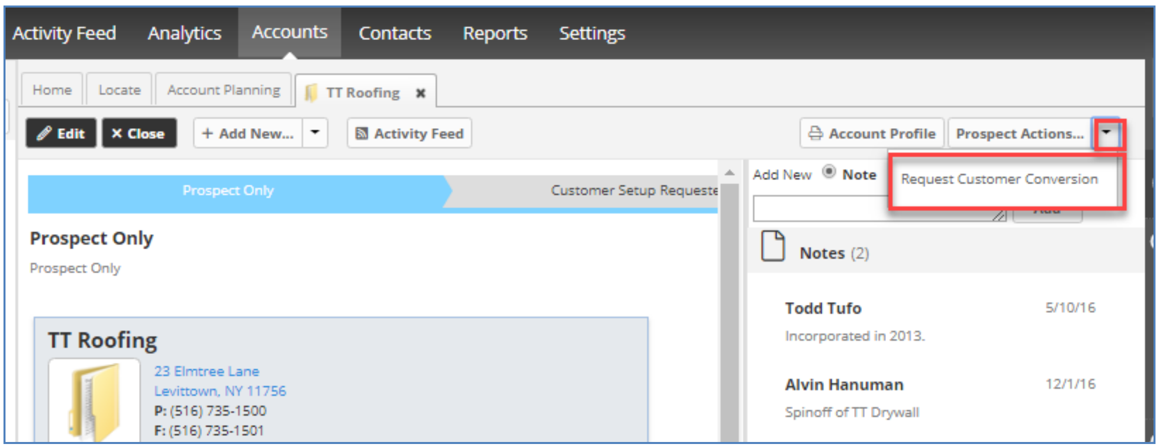
- If you created a duplicate Account or Contact, contact the Credit Department to have it deleted.

- If you make a mistake while entering a Prospect record and are asked to make a correction, just pull up the record and click Edit to make your changes. Do not correct your mistake by entering a whole new Prospect record for the same Account.

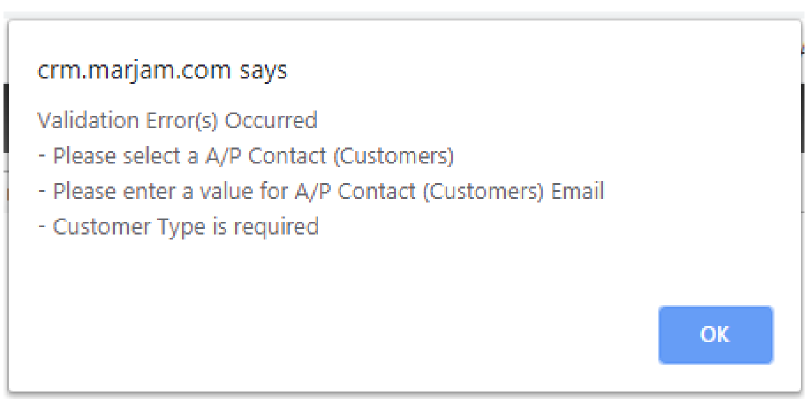
To Request Customer Conversion (upon pending Sales Order):

NOTE: If you are creating a Quote for a Prospect in SX.e, you MUST use the Branch Cash Account. You CANNOT convert a Prospect to a Customer in SX.e via WPCRM just to give someone a Quote. A Prospect should ONLY be converted upon approval of the Quote. Then perform an OEET copy (page 7).

- Access Prospect Customer Account.
- Click down arrow to the right of **Account Profile** or **Prospect Actions** and click **Request Customer Conversion.**



If there are any required entries not filled in, a warning message appears.



- Click **OK**.
- Go back into the Account and add the required information using the **Edit** function (see page 3).
- Repeat Request procedure. See above.

If the Prospect is complete, a Submit Message appears indicating your request has been successfully submitted.

- Click **OK**.

- An auto generated email notification will be sent to Corporate alerting that a Task has been created to set up your Customer. Workload determines how long it takes Corporate to set up your Customer. If you complete and submit your Prospect record correctly and have created no duplications, it will take much less time.

- An Activity Task to the Credit Dept. is created. The Customer's AP Contact receives a Quick Letter. Upon completion of the conversion, you will receive an email. Pricing Manager receives a Task.

- When you are asked to correct a Prospect record, DO NOT START OVER and create a whole new record (this just creates a duplicate record). Instead, pull up the existing record, click Edit, make the change, and click Save.

- When you are asked to correct a Contact record, you cannot make the correction in the Prospect record itself. You must pull up the Prospect or Account record, click the Contact icon at bottom right, click the Contact record you need to change, click Edit, make the change, and click Save.

- The Customer's AP Contact receives a Quick Letter. Marjam Pricing Manager receives a Task.

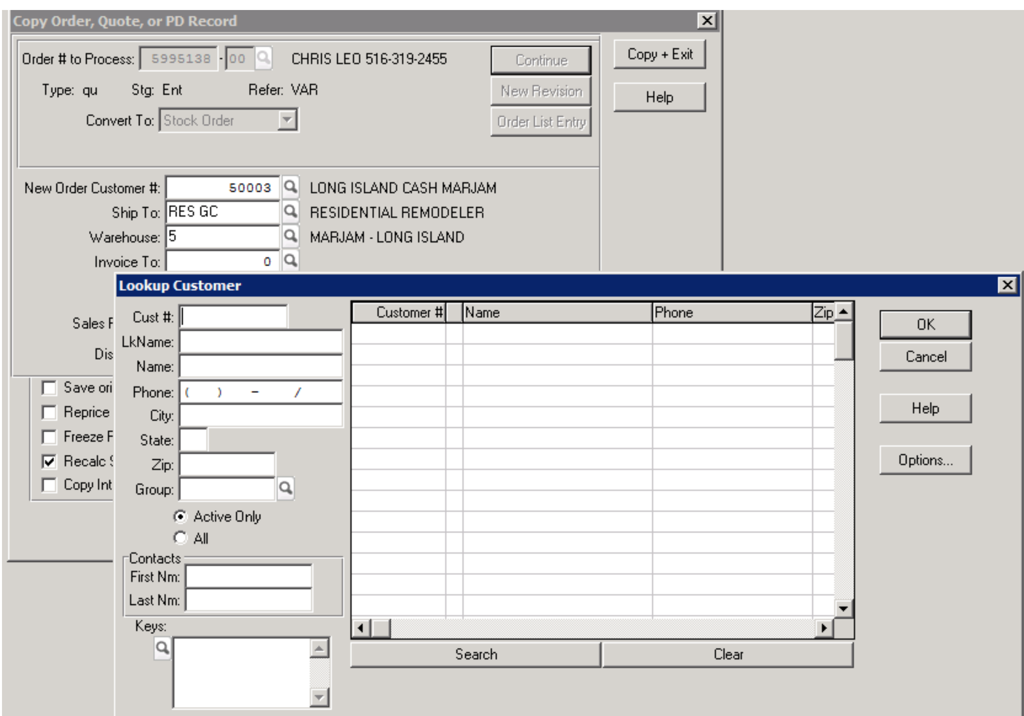
- Once Corporate converts your Prospect to a Customer, an auto generated email notification will be sent to you letting you know the Account Number for the new Customer and that a Task, dated two weeks out, has been created for you to check for steady sales. Also, you are the Account Rep for the Customer in SX.e GUI.

- If you have an SX.e GUI Order for a pending Customer (WPCRM Prospect) under the branch Cash Customer, you can copy the Order to the new Customer Number once you are notified the Account was flipped from a Prospect to an SX.e/WPCRM Customer (next page) so you get credit for the sale.

Copying an SX.e Order from Cash to New Customer

If you have an SX.e GUI Order under the branch Cash Customer, you can copy the Order to the new Customer Number upon its conversion from a WPCRM Prospect to an SX.e/WPCRM Customer.

1. To copy a Quote or Sales Order, access **OEET** in SX.e GUI.
2. Click **File** from the main menu bar and **Copy/PD** from the drop down menu.
3. Enter the number of the Order you want to copy into the Copy window.
4. Click the **Convert To** entry box to and the type of order you wish to create.
5. Click **Continue** to activate the middle portion of the window.
6. The Cash Customer Number defaults. You can enter the new Customer Number OR click the Lookup button as displayed below.



7. If desired, enter information into the respective entries. Click inside check boxes, such as **Copy Comments** and **Copy Notes** as needed to insert check marks to select.
8. Click **Copy** from the Copy Order, Quote or PD Record window. Note the new Order Number at the bottom of the window.
9. Click **OK**. Click **File** and then **Exit** to close the screen and exit the function.

PROSPECT VENDOR ENTRIES and CONVERSION

Review Account and if needed, click **Edit** to modify.

Entries with a down arrow will display a drop down list upon clicking in it. You can scroll down or type information to advance listing. Click a record to select. You can click a check box to insert a check mark where necessary. As you enter data, WPCRM will advise if similar Accounts already exist.

Entries in bold (below) are required for Vendor conversion, which is covered on page 9.

- ACCOUNT INFO: **Account Type (Prospect Vendor), Business Name** (avoid using special characters, such as period, comma, dash, colon, semi-colon and apostrophe; ampersand (&) is acceptable) **Address, Phone Number,** Fax

- CORPORATE INFO: **Company, Branch, President** (can add), Website, **AR Contact/email** (can add). Do not enter AP Contact.

  If the AR Contact is the same as the President, click **Same as President/Owner** in Contact entry.

- VENDOR ACCOUNT TEAM: **Buyer**, Accounts Payable Analyst

- VENDOR INFO: **Products, Federal Tax ID, Payment Terms, Vendor Type, Credit Card Type,** Sends (Marjam) Leads (Y/N button), **Referral Policy** (will Vendor refer Customers? Type Yes / No), Rebate Vendor (Y/N button), Minority Owned/Certificate #.

Click **Save** button.

Duplicate Accounts

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- WPCRM does not start showing you the potential duplicates until you have completely entered the Business name and have clicked in the next entry box. It is your responsibility to review the yellow highlighted list of possible duplicates to be certain you are not entering a duplicate record.

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- Best practice to avoid duplicates is to do a Quick Search on Business Name, Owner or Primary Contact Name, and Phone #'s. Perform a search of an Account under a different spelling.

- Perform a search of Contacts that will be added to your Prospect, as a person may have been with another company (will not appear as duplicate when entering new Prospect). If the Contact exists with another Account, check Contact Notes and access that Account record and verify if any issues have taken place.

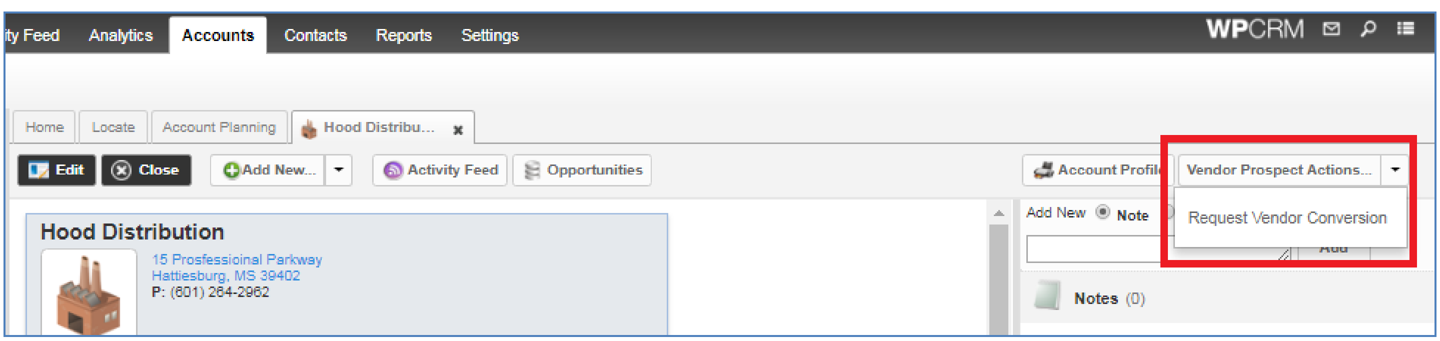
- If you have any concerns regarding an Account or Contact, contact the AP Department.

- If you created a duplicate Account or Contact, contact the AP Department to have it deleted.

- If you make a mistake while entering a Prospect record and are asked to make a correction, just pull up the record and click Edit to make your changes. Do not correct your mistake by entering a whole new Prospect record for the same Account.

To Request Vendor Conversion:

- Access Prospect Vendor Account.
- Click down arrow to the right of **Account Profile** or **Prospect Actions** and click **Request Vendor Conversion.**



If there are any required entries not filled in, a warning message appears.

- Click **OK**, go back into the Account (**Edit**) and add the required information (see page 8), and request again.

If the Prospect is complete, a Submit Message appears.

- Click **OK**.

An Activity Task to the Accounts Payable Dept. is created. Upon completion of the conversion by an Administrator, you will receive an email.