

# Beyond - Converting a Prospect to a Customer Record

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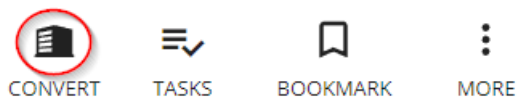
## What is a Prospect Record?

Prospect records allow you to quickly record and manage potential new customers and contacts, making it easier for your sales team to collect the information they need. Prospect records include the ability to track basic information, log messages and save documents electronically.

## Converting a Prospect to a Customer Record

Once a customer has signed a contract, you will want to be able to take the prospect record you have created and turn it into a full fledged Customer Record to create orders, manage billing, etc.

1. Navigate to the prospect record you would like to convert.
2. Select the Convert to Customer Charm:



3. Select the Branch the customer record should be tied to:

### Convert Prospect to Customer

#### Customer Branch

High Tech NE

Copy Messages

Messages linked to the prospect will also be linked to the new customer

Copy Documents

Documents linked to the prospect will be copied and linked to the new customer. Copies will still remain attached to the prospect.

#### Contacts

These selected prospect contacts will be converted to full contacts linked to the new customer:



★ Ed Montgomery · Owner

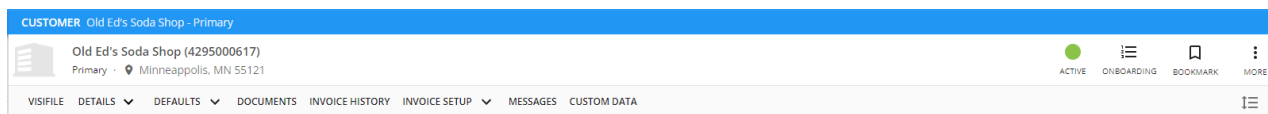


4. Select Options:

- Copy Messages: Copy any messages on the prospect record to the new customer record
- Copy Documents: Copy any documents uploaded on the prospect record

5. Select Contacts you would like created
6. Select Submit

You will be brought to the new customer record:



The Prospect record will still exist under prospects. However, the charm will be updated to allow you to quickly jump to the related customer record:

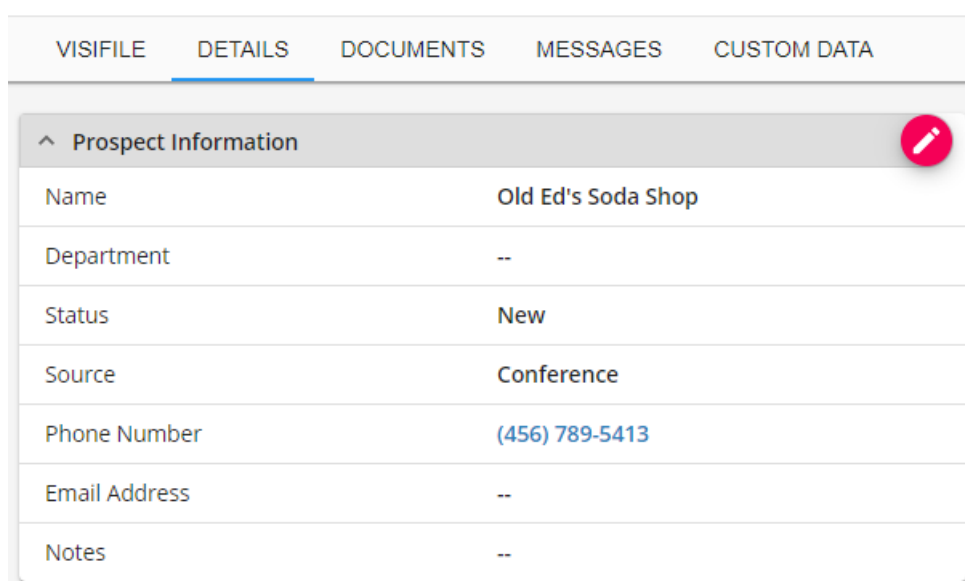



## Additional Items to Consider After Converting a Prospect Record

### Updating the Prospect Status

Now that the prospect record has been converted, consider changing the prospect records status to avoid confusion

1. Navigate to the details page of the prospect record:



2. Select the  button
3. Update the status to Converted:

## Prospect Information

Name	Department
Old Ed's Soda Shop	
Source	Notes
Conference	
Status	Email Address
Converted	
Contacted	
Converted	
New	

SAVE AS DRAFT CANCEL [SUBMIT](#)

### 4. Select Submit

## Updating the Customer Status

Once the customer has signed a contract, what are your next steps? Does the customer need to go through a credit check process? Can employees be assigned to orders right away? We recommend updating the customer status to reflect the next step in your process.

### 1. Navigate to the Customer Record:

VISIFILE	DETAILS	▼	DEFAULTS	▼	MORE	☰
^ Snapshot						
Last Payment						--
YTD Sales						0.00
AR Balance						0.00
Lifetime Sales						0.00
Status						Prospect >

### 2. Select the status under Snapshot on the visifile

### 3. Update the status (ex. Hold for Credit Check or Active):

Change Status
✕

Old Ed's Soda Shop (4295000617)

Hold for Credit Check
▼

Feel free to use any of the following actions, and then save the new status.

ACTIONS

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CREATE MESSAGE 🔗

---


CREATE TASK 🔗

SAVE STATUS

4. Complete any additional necessary items (including logging a message or creating a follow up task) See [Beyond - Status Change Workflows](#) for more details
5. Select Save Status

### Logging a Message

If your customer has signed a contract, you may want to have your process include logging a message on the customer record to document the successful sale.

1. On the customer visifile, select the  under messages to log a new message
2. Enter the details of the event:

Compose Message

Message

Sale made! Awaiting credit check and finalized paper work.

Action

Sales Call Close Date

Create a task

Subject

Follow up on credit check with team

---

Priority Due Date

📅
📌
🚩

6/24/2019 ✕

SAVE AS DRAFT

CANCEL

SUBMIT

3. Select an Action Code

4. Select Submit

### **Adding More Contacts**

Now that a sale is being finalized, you may also want to consider adding new contacts including any supervisors or AP contacts your team will be working with.

See [Beyond - Creating a Contact Record](#) for more information.

### **Customer Defaults**

If a sale is being finalized, there will be new information to add to the record. We recommend starting with Customer Defaults to set up items like worker comp codes and multiplier codes for this customer. See [Beyond - Customer Defaults](#).

Also check out [Beyond - Customer Record Must-Haves](#) for a full list of items you may want to consider.

### **Customer Billing Setup**

If a sale has been made, there may be some negotiations made on billing cycles, invoice recipients, etc. Utilize the Invoice Setup section of the customer record. Check out [Beyond - How to Manage Billing Setup](#) for more information.

## **Related Articles**