**CRM Prospect Creation**

**Overall Process**: In CRM/Salesforce (After Creation of Prospect), Using that we can be able to login in Express Onboarding page with the mail id that we gave in prospect creation.

**Prospect Creation on CRM/Salesforce**

1. Login to Salesforce
2. On Business and Leads click on New Button
3. Fill the below in New (First last name, Mobile, Email, FIRN Number, Business Name (DBA), Branch Name)
4. Then Select Assign Assigned External/Internal Recruiter Name
5. Then Select Assign Wealth Management Firm
6. Then Select Recruiting Lead Source
7. Then click on save button (Lead Creation Toaster occurs)
8. Then click on convert Lead on the top right.
9. Now you are in convert screen.
10. Then click on convert.
11. Now you see Your lead has been converted.
12. Open the contact and opportunity in another tabs.
13. In opportunity page click and select the Referring Advisor Name as which you created now
14. Next select BDS name on opportunity information
15. Now on opportunity tab click the Invite to EO Portal on the top right.

Once the above is completed you can be able to see the below POP UP

Confirmation

The invite to the Welcome Hub has been sent to your prospect.