CRM Prospect creation

First name

Last name

Finra crn

Dob

Business name

Branch name

Assigned Wealth Management Firm

Assigned External Recruiter Name

Assigned Internal Recruiter Name

Personal Mobile Number

Personal Email

Recruiting Lead Source

Current Type of Practice

SAVE

Convert Lead

Convert

Open contact and opportunity in new tabs

On Opportunity tab – assign the contact created.

Save

Click Invite to EO Portal