**Integrated Customer Onboarding Workflow in CRM Systems**

**Prospect Creation in CRM/Salesforce:**

* In the CRM system, a user initiates the creation of a prospect. This involves entering relevant information about a potential customer, including their email address.

**Storage of Prospect Information:**

* The CRM system securely stores the prospect's information, including the provided email address, in its database. This ensures that the data is readily available for subsequent processes.

**Express Onboarding Page Integration:**

* There is an integrated Express Onboarding page that interacts with the CRM system. This page is designed to facilitate a streamlined onboarding process for prospects.

**Login Functionality:**

* The Express Onboarding page includes a login mechanism that allows users to access onboarding features. This login functionality is linked to the information provided during the prospect creation, specifically the email address.

**Authentication Process:**

* When a user attempts to log in on the Express Onboarding page, the system verifies their identity using the email address associated with the prospect. This may involve authentication protocols such as username-password validation or token-based authentication.

**Access Granted:**

* Upon successful authentication, the user is granted access to the Express Onboarding page. They can now proceed with the onboarding process.

**Utilizing Prospect Data:**

* As the user progresses through the onboarding process, the system may dynamically retrieve additional details about the prospect from the CRM system. This could include personalized information gathered during the prospect creation.

**Integration Points:**

* The CRM system and the Express Onboarding page are integrated seamlessly, likely through APIs (Application Programming Interfaces) or other integration mechanisms. This ensures real-time data synchronization and a cohesive user experience.

Express Onboarding User Flow

1. Prospect Creation on CRM/Salesforce

**1.1 Login to Salesforce**

* Open your web browser and navigate to [Salesforce URL].
* Enter your credentials and log in.

**1.2 Create a New Lead**

* Go to the "Business and Leads" section.
* Click on the "New" button.

**1.3 Fill Lead Information**

* Enter the following details:
* First and Last Name
* Mobile Number
* Email Address
* FIRN Number
* Business Name (DBA)
* Branch Name

**1.4 Assign External/Internal Recruiter**

* Select the assigned external/internal recruiter.

**1.5 Assign Wealth Management Firm**

* Choose the appropriate wealth management firm.

**1.6 Select Recruiting Lead Source**

* Specify the recruiting lead source.

**1.7 Save Lead**

* Click on the "Save" button.
* A Lead Creation Toaster will confirm the lead creation.

**1.8 Convert Lead**

* Click on "Convert Lead" at the top right.

**1.9 Convert Screen**

* In the Convert screen, click on "Convert."

**1.10 Lead Conversion Confirmation**

* Confirm the message indicating that your lead has been converted.

**1.11 Open Contact and Opportunity Tabs**

* Open the contact and opportunity in separate tabs.

**1.12 Set Referring Advisor Name**

* In the opportunity page, select the Referring Advisor Name.

**1.13 Set BDS Name**

* Choose the BDS name in the opportunity information.

**1.14 Invite to EO Portal**

* On the opportunity tab, click "Invite to EO Portal" at the top right.

**1.15 Confirmation Popup**

* A confirmation popup will appear with the message: "The invite to the Welcome Hub has been sent to your prospect."

2. Express Onboarding Page

**2.1 Access Express Onboarding**

* Open your web browser and navigate to [Express Onboarding URL].
* Log in using the email address provided during the prospect creation.