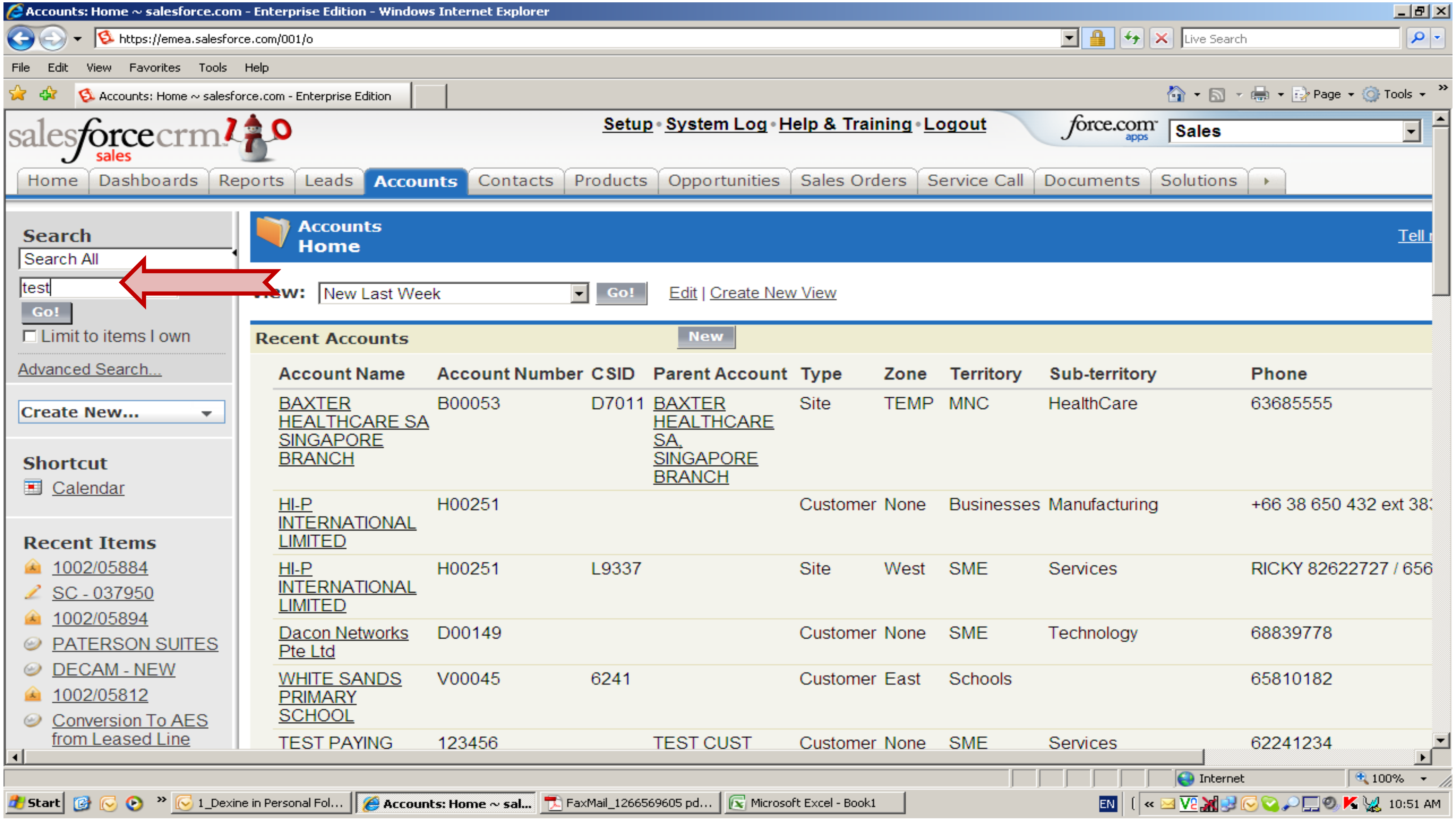
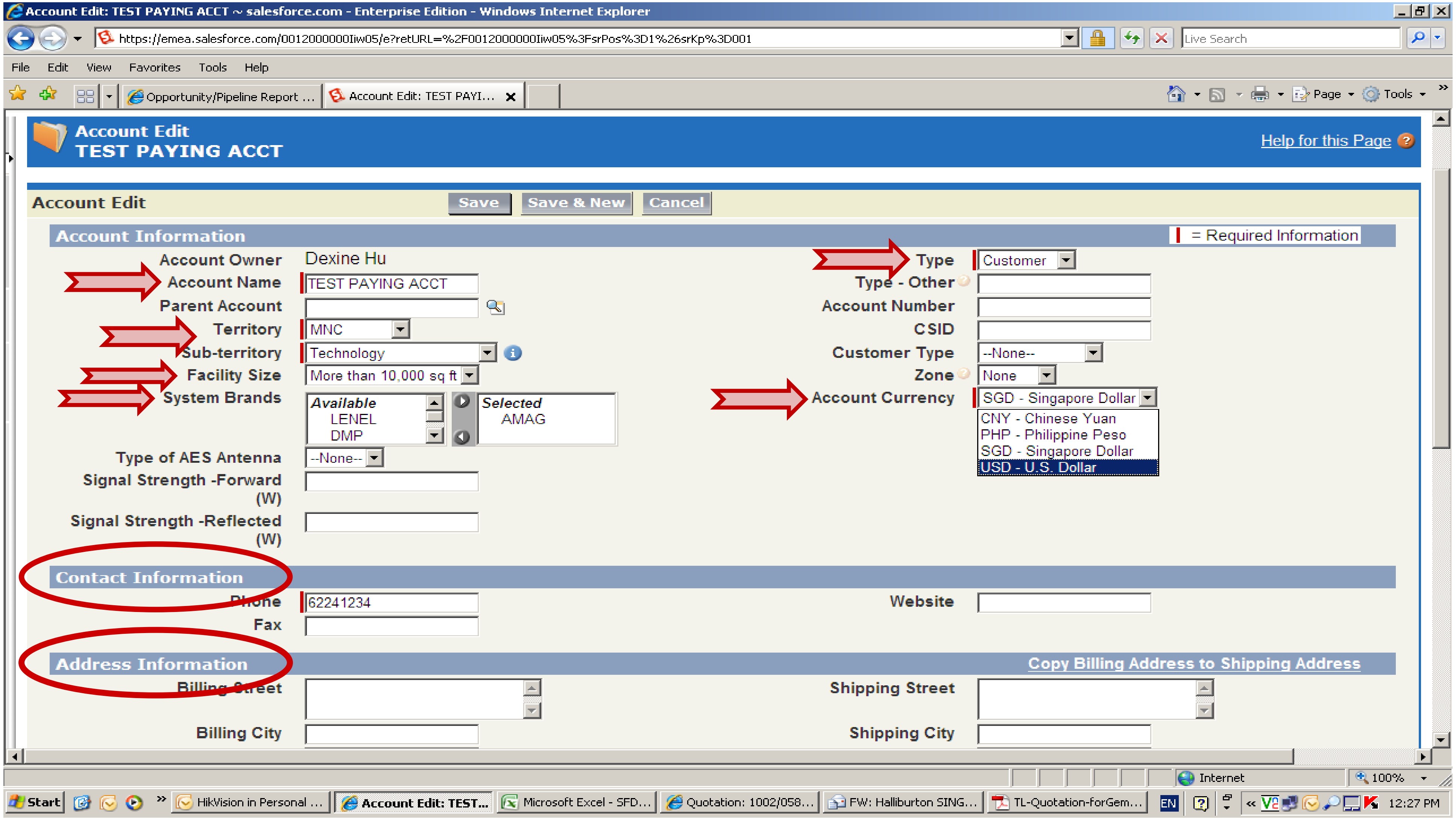
OPPORTUNITIES - Part 1

1. Search for "Account" first to check and ensure NO duplicate records are created.



2. If the account is not an existing record, create a new "Account" For this new Client.



3. Any additional/useful information or meaningful Activity/Event history should also be keyed in.

Eg. Contact information, Calls/Meetings with Client, Unique system requirements