

# Create and update a Prospect

## Purpose

This Standard Operating Procedure has been developed to provide you with an understanding of how to create and update Prospects in the NAXT system.

Use this procedure to:

- Create a new Prospect record
- Add a site address to the Prospect
- Add a contact person for each site address. This is NOT the same as adding a contact person to a Prospect record – this is covered in *CRM\_1.1(SOP)Add a Contact to a Prospect*
- Add which potential sales division will be responsible for the Prospect
- Add credit and tax information to the Prospect

A Prospect should generally be set up as a business rather than as an individual person. If you set a Prospect up as a person, you still must set up a contact to record the relationships.

Different information is recorded for a Prospect, a customer or a contact; for example, decision-makers and influencers are recorded as a contact and a business who will potentially make a purchase is recorded as a Prospect. These records can all be linked and share information if required.

## What is covered in this guide

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# Terminology

<b>Prospect</b>	A Prospect is an individual or company who is a potential customer. A Prospect record is someone who “may do business”. We create Prospects so we can keep a track of potential customers and how we can turn them into sales
<b>Customer</b>	A Customer is a person who buys goods or services from us. A Customer record is required “to do business”
<b>Contact</b>	Contacts are pieces of additional information attached to a Prospect or Customer. It is like the records in your email address book or contacts on your phone but linked to a Prospect or a Customer. An individual may have themselves as the Customer and then their spouse as a Contact. A company might have the Director, Accounts Person and a Manager as their contacts
<b>Contact Information</b>	The details that can be used to contact a Prospect, customer or contact
<b>Equipment</b>	Machinery or equipment linked to a Prospect or customer

## Use of icons

 <b>Business rule</b>	 <b>Key point / Tips</b>	 <b>Information</b>
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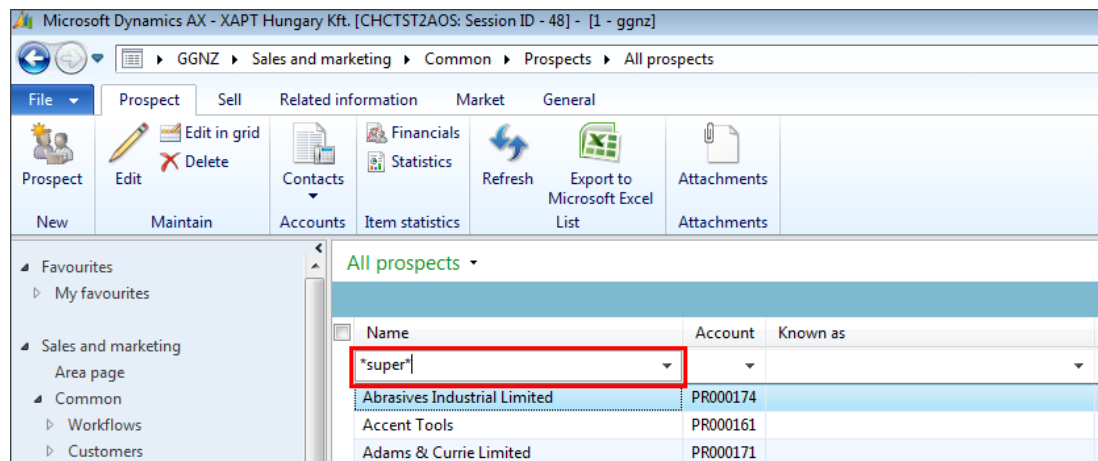
# Task 1. Find a Prospect

1. Navigate to:

**GGNZ > Sales and marketing > Common > Prospects > All Prospects**

2. Enter all or part of the Prospects name in the **Name** field
3. Press **Enter**

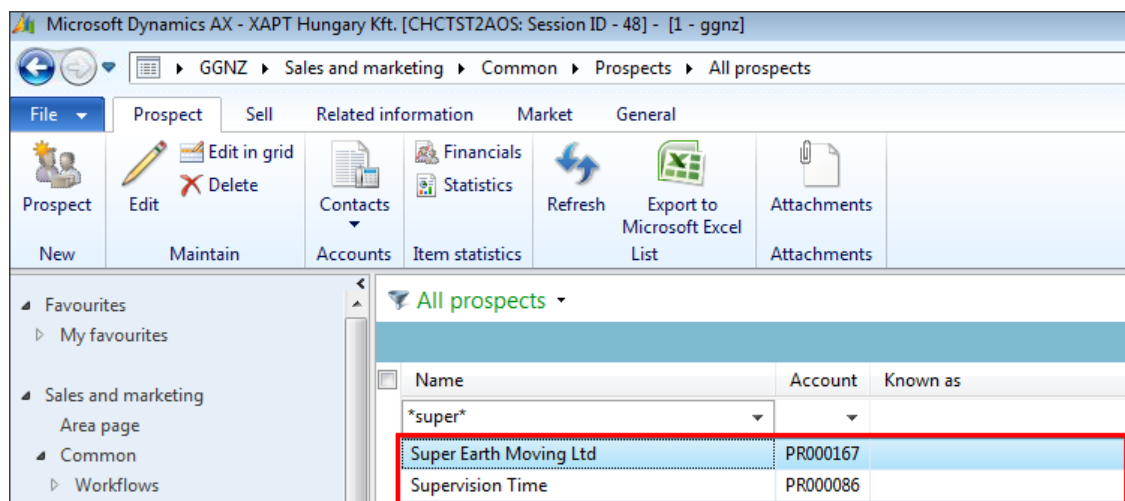
Any Prospect records matching your search will display



Use wild-cards (\*) in your search text to ensure the correct search is completed. For example, the Prospect is Super Earth Moving Ltd. Typing in 'super' will only locate any Prospects with the name "Super". Typing in '\*super\*' will locate any records that contain the word "super".

4. Is the Prospect you require displayed?

- **Yes:** Double-click on the record to open it
- **No:** Go to Step 5 to create a new Prospect



## Task 2. Create a Prospect record



Before creating a new Prospect record, you should always search the existing Prospect records using wildcards to ensure they do not already exist in NAXT.

### 5. Select **Prospect > Prospect**

The **Create new Prospect** window will display

Microsoft Dynamics AX - XAPT Hungary Kft. [CHCTST2AOS: Session ID - 48] - [1 - ggnz]

Navigation: GGNZ > Sales and marketing > Common > Prospects > All prospects

File > **Prospect** > Sell > Related information > Market > General

Prospect > Edit > Delete > Edit in grid > Contacts > Financials > Statistics > Refresh > Export to Microsoft Excel List > Attachments

New > Maintain > Accounts > Item statistics > Attachments

Favourites > My favourites > Sales and marketing > Area page > Common > Workflows

All prospects >

Name	Account	Known as
Abrasives Industrial Limited	PR000174	
Accent Tools	PR000161	

6. Complete the following fields:

- a. **Record type** Organisation
- b. **Name**
- c. **Address and contact information** If you know it you can enter it here, otherwise enter it into the Prospect record. Go to Steps 8 and 12 for more information

Prospect (1 - ggnz) - New Record

Create new prospect

Prospect: PR000179

Record type: Organisation

Name: Milk Man Ltd

**Details**

Type ID: Prospect Delivery terms:

Currency: NZD Mode of delivery:

**Address and contact information**

Country/region: NZL Phone: 03 335 2568

ZIP/postcode: 8042 Extension: 152

Street: 14 Amyes Road Fax:

E-mail address:

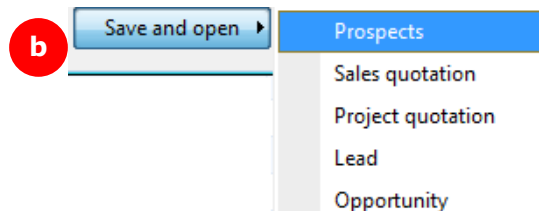
City: Christchurch

Suburb: Hornby

Save and close Save and open Cancel

7. There are three ways to complete this procedure:

- a. **Save and close:** This will save the new Prospect and take you back to the **All Prospects** window
- b. **Save and open:** If you want to open the Prospect record, a sales or project quote, a lead or a new opportunity you can do this directly by clicking on **Save and open** and then selecting from the dropdown menu
- c. **Cancel:** This will cancel out of the **Prospect** window and not create the new Prospect



## Task 3. Add tax information to the Prospect record

- On the **Prospects** window, expand **Credit and tax** fast tab

The **Credit and tax** fast tab will display

The screenshot shows the 'Prospects (1 - ggnz) - Prospect: PR000179, Milk Man Ltd, Prospect: PR000179' window. The 'Prospect' tab is selected. The 'Credit and tax' fast tab is highlighted in red. The 'General' section is expanded, showing 'Prospect' details (Account: PR000179, Record type: Organisation, Name: Milk Man Ltd, Search name: Milk Man Ltd, Type ID: Prospect) and 'Organisation details' (Number of employees: 0, Organisation number, ABC code: None, DUNS number). The 'Addresses', 'Contact information', 'Miscellaneous details', 'Sales demographics', 'Opportunity', 'Division', and 'Credit and tax' fast tabs are listed below.

- Set the **Tax** field to 'GST'

The screenshot shows the 'Credit and tax' fast tab. The 'Tax' field is highlighted in red and set to 'GST'. The 'Credit' section shows 'Mandatory credit limit' and 'Credit rating'. The 'Tax' section shows 'Prices include GST' and 'GST'.

## Task 4. Add address information to Prospect record

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10. In the **Prospects** window, expand **Addresses** fast tab

The **Addresses** fast tab will display, and any addresses already added will display

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11. Select **Add**

The **New address** window will display

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12. Expand **Address** fast tab, complete the following fields:

a. **Name or description**

It is possible to record multiple addresses against a Prospect, so this field allows you to distinguish them – such as 'Head Office', or 'Regional Office'

b. **ZIP/postcode**

This field is required to ensure the correct region is populated. It helps to make mail-outs straightforward. City and District (Suburb) then auto-populates

The District field should show your correct suburb. If incorrect, use the ZIP/postcode drop-down to change

User must select it and not type to ensure 'County' code (mandatory CAT field) populates which is used by OLGA, Machine sales team for Scoring

c. **Street**

Mandatory! This must not be left blank. Enter Cash sale for a COD account, for cash sales this should be populated with the nearest branch address, and 24 Amyes Road for internal accounts

d. **City**

e. **Suburb**

This will default from what you have entered in the **Postcode** field. Check this is correct and update if required

f. **Primary**

If this is the first address you are entering the **Primary** checkbox will default with a tick. Update this as required

g. Select **Ok**

The screenshot shows a dialog box titled "New address (1) - Prospect: PR000179, Milk ...". It contains the following fields and sections:

- Location ID: 000004912
- Name or description: Head Office (highlighted with a red box and circle 'a')
- Purpose: Business
- Contact information section:
  - Address section (highlighted with a red box):
    - Country/region: NZL
    - ZIP/postcode: 8042 (highlighted with a red box and circle 'b')
    - Street: 16 Amyes Road (highlighted with a red box and circle 'c')
  - GST: (empty)
  - City: Christchurch (highlighted with a red box and circle 'd')
  - Suburb: Hornby (highlighted with a red box and circle 'e')
  - Primary: ☒ (highlighted with a red box and circle 'f')
  - Primary for country: ☐
  - Private: ☐
- General section (empty)
- Buttons: OK (highlighted with a red box) and Cancel



### 13. Amend or add current addresses as necessary

- Select **Edit** icon
- Select **Add** icon

Prospects (1 - ggnz) - Prospect: PR000179, Milk Man Ltd, Prospect: PR000179

File Prospect Sell Related information Market General

Edit Delete Prospect Financials Item statistics Attachments

Maintain New Accounts Statistics Attachments

PR000179 : Milk Man Ltd

**General**

Change party association

<b>Prospect</b>	<b>Organisation details</b>	<b>Other information</b>
Account: PR000179	Number of employees: 0	Doing business as:
Record type: Organisation	Organisation number:	Address books:
Name: Milk Man Ltd	ABC code: None	Language: en-nz
Search name: Milk Man Ltd	DUNS number:	<b>Export information</b>
Type ID: Prospect		CK Reg #
		Local Dealer Code:

Show more fields

**Addresses**

**a** **b** Add Edit Map More options

Name or description	Address	Purpose	Primary
Milk Man Ltd	14 Amyes Road Hornby Christchurch 8042	Business	Yes
Head Office	16 Amyes Road Hornby Christchurch 8042	Business	No

14. When there are multiple delivery addresses a default delivery address can be set;

- a. Select **More options** drop-down box
- b. Select **Set defaults**

The **Default address** selection window will appear

Customers (1 - ggnz) - Customer account: 3014980, Te Hana Tractors Ltd

File Customer Sell Invoice Collect Projects Service Market General Equipm

Edit Delete Customer Contacts Transactions Balance Credit balance Forecast Bank accounts Summary update Credit cards

Maintain New Accounts Transactions Balance Forecast

3014980 : Te Hana Tractors Ltd

General

Change party association

Customer

Account: 3014980  
Record type: Organisation  
Name: Te Hana Tractors Ltd  
Search name: Te Hana Tractors Ltd  
Customer group: EXT - NZ  
Classification group:  
CAPP Code:

Organisation details

Number of employees: 0  
Organisation number:  
ABC code: None  
DUNS number:

Other information

Address books:  
Language: en-nz  
Doing business as:

Export informa

OK Reg #  
Local Dealer Code

TEPS

TEPS Code:  
RDD Type:  
Stock order limit:

Show more fields

Addresses

Add Edit Map More options

Name or description Purpose Primary

Te Hana Tractors Ltd Business Yes

Te Hana Tractors Ltd 308 State Highway 1  
Te Hana  
RD 4  
Wellsford 0974 Delivery No

15. Select the correct address from the **Default address** drop-down box

16. Select **OK**

Default address (1 - ggnz) - Customer account: 3014980, Te Hana Tractors Ltd

Select the default address for Customer Te Hana Tractors Ltd

Default address

Address: 308 State Highway 1  
Te Hana  
RD 4  
Wellsford 0974

000026677

Location ID	Name or description	Address
000026677	Te Hana Tractors Ltd	308 State Highway 1 Te Hana RD 4 Wellsford 0974
000180070	TE HANA TRACTORS LTD	308 STATE H/WAY 1 TE HANA WELLSFORD

OK Cancel

## Task 5. Add basic contact information to the Prospect record



This section covers how to record contact information for a Prospect, such as the phone or email contact of the regional office. Contact information for specific contacts will be added against the contact record. For more information see **SOP CRM\_1.1\_Add a Contact to a Prospect**.

17. To add general contact information for the Prospect, go to Step 19

18. To add contact information linked to an address for the Prospect, go to Step 21

19. Add general contact information:

- Expand Contact information fast tab
- Select **Add**
- Make sure the **Preferred contact method** tickbox is ticked on the same row that **Primary** is ticked. If there is only one row here, tick the box.

A new contact line will display

Description	Type	Contact number/address	Preferred contact method	Extension	Primary
main fax number	Fax	033492304	<input type="checkbox"/>		<input checked="" type="checkbox"/>
main e-mail	E-mail address	christchurch@waterforce.co.nz	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
main phone number	Phone	033492605	<input type="checkbox"/>		<input checked="" type="checkbox"/>

20. Complete the following fields (and edit later by selecting More options > Advanced):

a. **Description**

b. **Type**

Select from drop down Phone, Email address, URL, Telex or Fax – Note drop down disappears after value is selected. Add a new row here to change the type by copying values to a new row, and delete the old row.

c. **Contact number/address**

d. **Extension**

If required

e. **Purpose**

Business

f. **Primary**

If required – see note below

PR020555 : Waterforce Ltd Christchurch

► General

► Addresses

▲ Contact information

Description	Type	Contact number/address	Prefe...	Extension	Primary
main fax number	Fax	033492304	<input type="checkbox"/>		<input checked="" type="checkbox"/>
main e-mail	E-mail address	christchurch@waterforce.co.nz	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
main phone number	Phone	033492605	<input type="checkbox"/>		<input checked="" type="checkbox"/>

Edit contact information (1) - Prospect: PR020555, Waterforce Ltd Christchurch

Description	Contact number/address
main phone number	033492605

Location: 000088638

Description: main phone number

Type: Phone

International calling code:

Phone: 033492605

Extension:

Purpose: Business

Mobile: ☐

Primary: ☒

Private: ☐

The reason or use for the contact.

Close



Selecting the primary box will ensure the contact number/ email show on your filtered lists, **"All Prospects"** or **"My Prospects"** etc. Only one of each "type" can be primary e.g. 1 x phone, 1 x email.

21. Add contact information linked to an address:

- a. Expand the **Address** fast tab
- b. Select **Add** (or **Edit**, as required)

The **New address** window will display

The screenshot shows the 'Prospect: PR000179, Milk Man Ltd' window. The 'General' section is expanded, showing fields for 'Prospect', 'Organisation details', and 'Other information'. Below this, the 'Addresses' section is expanded, showing a table of addresses. A red circle 'a' highlights the 'Add' button in the 'Addresses' toolbar, and a red circle 'b' highlights the 'Edit' button.

Name	Address	Purpose	Primary
Milk Man Ltd	14 Amyes Road Hornby Christchurch 8042	Business	Yes
Head Office	16 Amyes Road Hornby Christchurch 8042	Business	No

22. Add a new contact,

Select the following;

- a. Expand **Contact information** fast tab
- b. Select **Add**

Enter the following;

- c. **Description**
- d. **Type** Phone, Email address, URL, Telex or Fax
- e. **Contact number/address**
- f. **Extension** If required
- g. **Primary** The row where this is ticked will appear in the All Prospect grid

Manage addresses (1) - Prospect: PR020555, Waterforce Ltd Christchurch

File ▾

+ Add Map More options ▾

View: Active ▾

Name or description: Waterforce Canterbury

Location ID: 000088639

Name or description: Waterforce Canterbury

Purpose: Business ▾

**Contact information** a

+ Add - Remove b

Description c	Type d	Contact number/address e	Extension f	P. g
	Phone	0271234567		<input checked="" type="checkbox"/>

Address

General

Indicates that the record is the primary contact information.

Close

23. Select **Close** once all records have been added

24. Go to **Contact information** fast tab and make sure the **Preferred contact method** tickbox is ticked on the same row that **Primary** is ticked. If there is only one row here, tick the box

PR020555 : Waterforce Ltd Christchurch

▸ General

▸ Addresses

**Contact information**

+ Add More options ▾

Description	Type	Contact number/address	Preferred contact method	Extension	Primary ▾
main fax number	Fax	033492304	<input type="checkbox"/>		<input checked="" type="checkbox"/>
main e-mail	E-mail address	christchurch@waterforce.co.nz	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
main phone number	Phone	033492605	<input type="checkbox"/>		<input checked="" type="checkbox"/>



## Task 6. Add sales and demographic information to the Prospect record

25. On the **Prospects** window, expand **Sales demographics** fast tab

The **Sales demographics** fast tab will display

The screenshot shows the 'Prospects (1 - ggnz) - Prospect: PR000179, Milk Man Ltd, Prospect: PR000179' window. The 'Sales demographics' fast tab is highlighted with a red box. The window displays various tabs and fields for the prospect record.

Prospect	Organisation details	Other
Account: PR000179	Number of employees: 0	Doir
Record type: Organisation	Organisation number:	Add
Name: Milk Man Ltd	ABC code: None	Lang
Search name: Milk Man Ltd	DUNS number:	Exp
Type ID: Prospect		CK F
		Loca

Below the table, there are expandable sections: Addresses, Contact information, Miscellaneous details, Sales demographics (highlighted), Opportunity, and Division.

26. Complete the following fields:

- a. **Segment** Select what type of business the company is, such as 'local contractor'
- b. **Subsegment** Select what type of business the company does, such as 'landscaping'
- c. **Sales district** Assign the Prospect to a sales district, such as 'Christchurch' etc.
- d. **Owner class** Select whether the business is 1 private, 2 national, etc.

The screenshot shows the 'Sales demographics' fast tab. The following fields are highlighted with red boxes and labeled with letters:

- a. Segment: LL
- b. Subsegment: L20
- c. Sales district: CHRISTCHURCH
- d. Owner class: 1

Other visible fields include: Direct mail (checked), Employee responsible: Jo Hikuroa, Line of business, Currency: NZD, and Note.



## Task 7. Add division to a Prospect record

27. On the **Prospects** window, expand **Division** fast tab

The **Division** fast tab will display

The screenshot shows the 'Prospects (1 - ggnz) - Prospect: PR030344, Milk Woman Ltd' window. The 'General' tab is selected, and the 'Division' fast tab is expanded, highlighted with a red box. The 'Division' fast tab is located at the bottom of the 'General' tab's list of fast tabs. The 'General' tab displays the 'Change party association' section, which includes fields for 'Prospect' (Account: PR030344, Record type: Organisation, Name: Milk Woman Ltd, Search name: Milk Woman Ltd, Type ID: Prospect) and 'Organisation details' (Number of employees: 0, Organisation number: , ABC code: None, DUNS number: ). The 'Other' section is also visible, showing 'Doing', 'Addre', 'Langu', 'Expor', 'CK Re', and 'Local'.

Prospects (1 - ggnz) - Prospect: PR030344, Milk Woman Ltd

File Prospect Sell Related information Market General

Edit Delete Prospect Contacts Financials Item statistics Attachments

Maintain New Accounts Statistics Attachments

PR030344 : Milk Woman Ltd

**General**

Change party association

**Prospect**

Account: PR030344

Record type: Organisation

Name: Milk Woman Ltd

Search name: Milk Woman Ltd

Type ID: Prospect

**Organisation details**

Number of employees: 0

Organisation number:

ABC code: None

DUNS number:

**Other**

Doing

Addre

Langu

**Expor**

CK Re

Local

Show more fields

Addresses

Contact information

Miscellaneous details

Sales demographics

Opportunity

**Division**

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28. Complete the following fields:

- a. **Primary** Tick the box for the one division the customer would work with most (Mandatory)
- b. **Division** Add the divisions the customer would work with:  
For Product support = EPT, Prime product EEQ  
If an **ISR** (Inside Sales Rep) or **PSSR** (Product Support Service Rep) is working with the customer, add **EPT**  
If a **TSM** (Territory Sales Manager) is working with the customer, add **EEQ** or **EPS** for Power Systems
- c. **Details** Select this to open Prospect division window

Primary	Division	Description
<input checked="" type="checkbox"/>	EPT	Parts Sales
<input type="checkbox"/>	ESV	Service

29. Select **New** then update Prospect division

- a. **Salesperson type** Choose from the list
- b. **Salesman code** Sales Manager approval is required for sales rep assignment. This update will mean the Sales person chosen will see the prospect in their My prospects list.
- c. **PARs** This indicates the number of times the sales rep contacts the customer in a year. PAR = Planned Annual Rate. It should not be zero.
- d. **Close**

Prospect division (1 - ggnz) - Division: EPT

File New Delete

Overview

General

Division	Description
EPT	Parts Sales

Division - Sales Person

Industry codes

Division reference

Salesperson type	Salesman code	Name	PARS	Special assignment
PSSR	EPTSTH02	Toby McLaughlin	0	

PARS. (24) NZD ggnz Close

### 30. Select Industry codes then select New

- a. **Primary** Tick the box on the appropriate row, if only one row, tick the box
- b. **SIC Code** Select the relevant code  
(If the SIC code field is not editable, Delete the row and add it again with the Delete and New Buttons.)
- c. **PWC/CIC code** Select the relevant code
- d. **CIC code** Select the relevant code – this is mandatory for CAT/OLGA

Prospect division (1 - ggngz) - Division: EPT

File New Delete

Overview

General

Division - Sales Person

Industry codes

Division reference

Primary	SIC Code	Description	PWC/CIC code	PWC Description	CIC code	CIC Description
<input checked="" type="checkbox"/>	0831	Forest Products	402	Harvesting and Processing	FY10	Logging

Whether this SIC code is primary or not. NZD ggngz Close

## Task 8. Link equipment to a Prospect record

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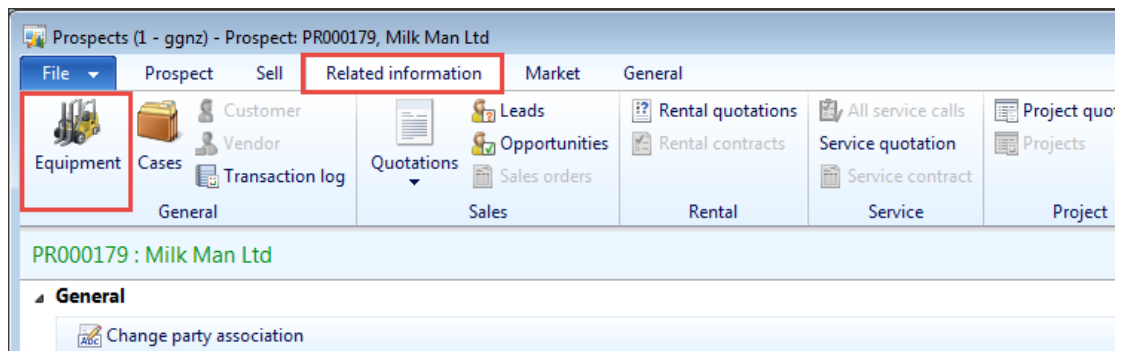
These steps are identical to part of the process covered in [SLS 6.4 Load and Maintain Equipment Population CSC](#)

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## Task 9. Check the equipment item is linked to the Prospect record

31. See Task 1 Find a Prospect to locate the Prospect record

32. Select **Related information > Equipment**



Prospects (1 - ggnz) - Prospect: PR000179, Milk Man Ltd

File | Prospect | Sell | **Related information** | Market | General

**Equipment** | Cases | Customer | Vendor | Transaction log | Quotations | Leads | Opportunities | Sales orders | Rental quotations | Rental contracts | All service calls | Service quotation | Service contract | Project quotations | Projects

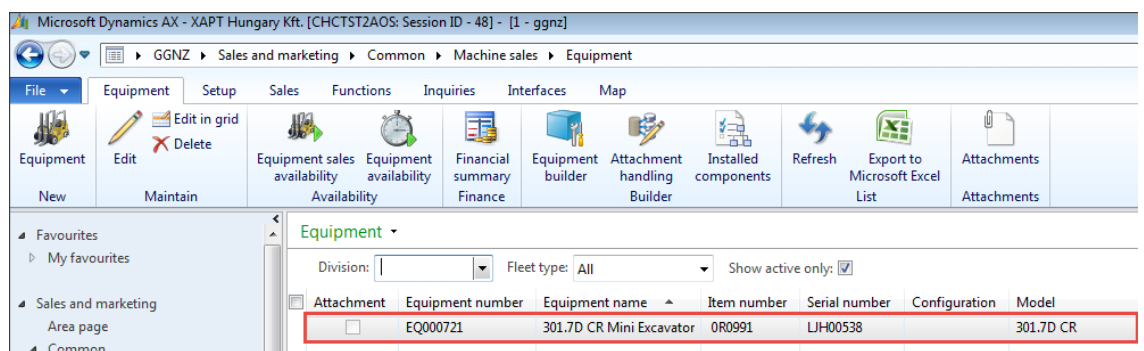
PR000179 : Milk Man Ltd

**General**

Change party association



The **Equipment** window will display with any equipment items that are linked to the Prospect record showing.



Microsoft Dynamics AX - XAPT Hungary Kft. [CHCTST2AOS: Session ID - 48] - [1 - ggnz]

GGNZ > Sales and marketing > Common > Machine sales > Equipment

File | Equipment | Setup | Sales | Functions | Inquiries | Interfaces | Map

**Equipment** | Edit in grid | Delete | Equipment sales availability | Equipment availability | Financial summary | Equipment builder | Attachment handling | Installed components | Refresh | Export to Microsoft Excel List | Attachments

New | Maintain

**Equipment**

Division: | Fleet type: All | Show active only: ☒

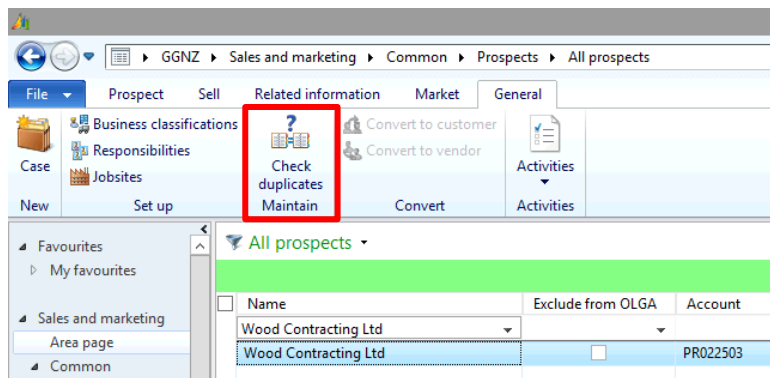
Attachment	Equipment number	Equipment name	Item number	Serial number	Configuration	Model
<input type="checkbox"/>	EQ000721	301.7D CR Mini Excavator	0R0991	LJH00538		301.7D CR

## Task 10. Check for duplicates

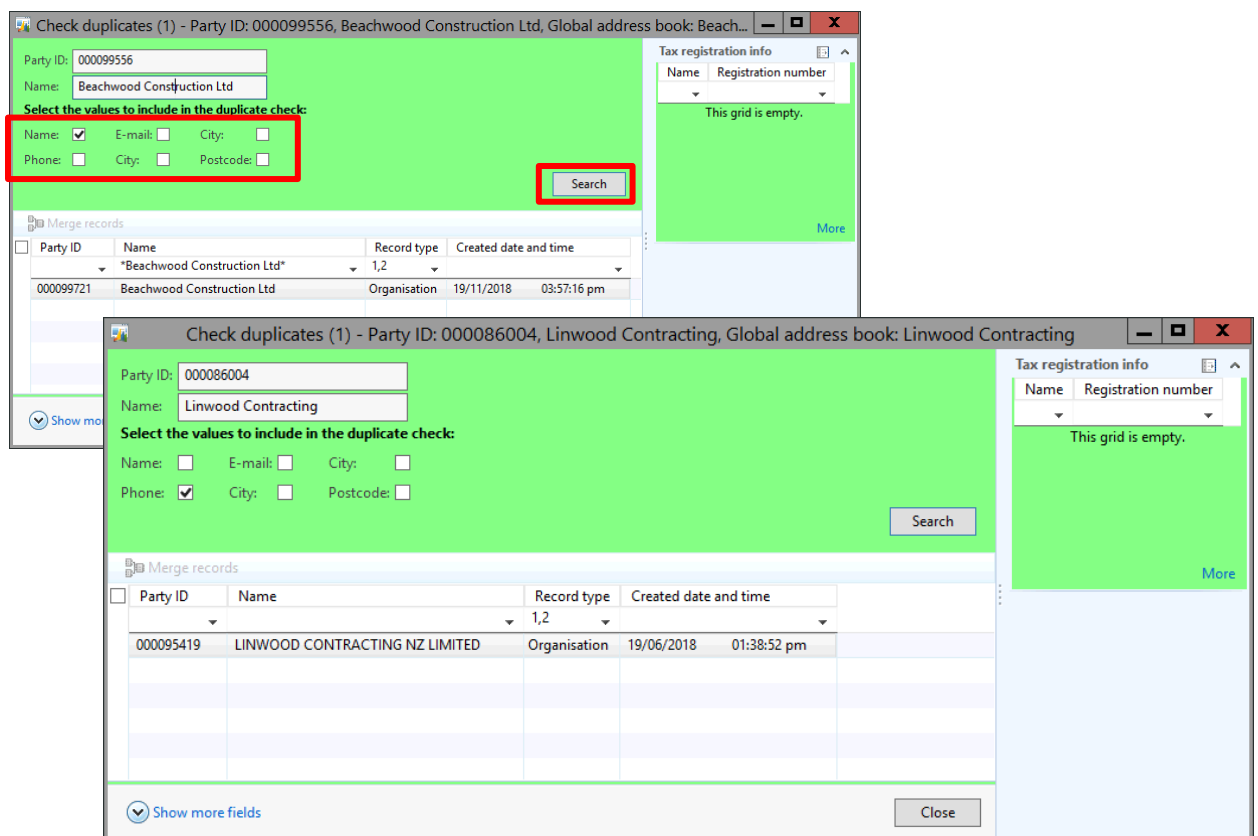
33. Navigate to:

**GGNZ > Sales and marketing > Common > Prospects > All Prospects**

34. Wildcard searches and filtering in the grid are both good ways to find duplicates, but you can also do so by navigating to **General** and selecting **Check duplicates**



35. Use the tick boxes and select **Search** to find duplicates



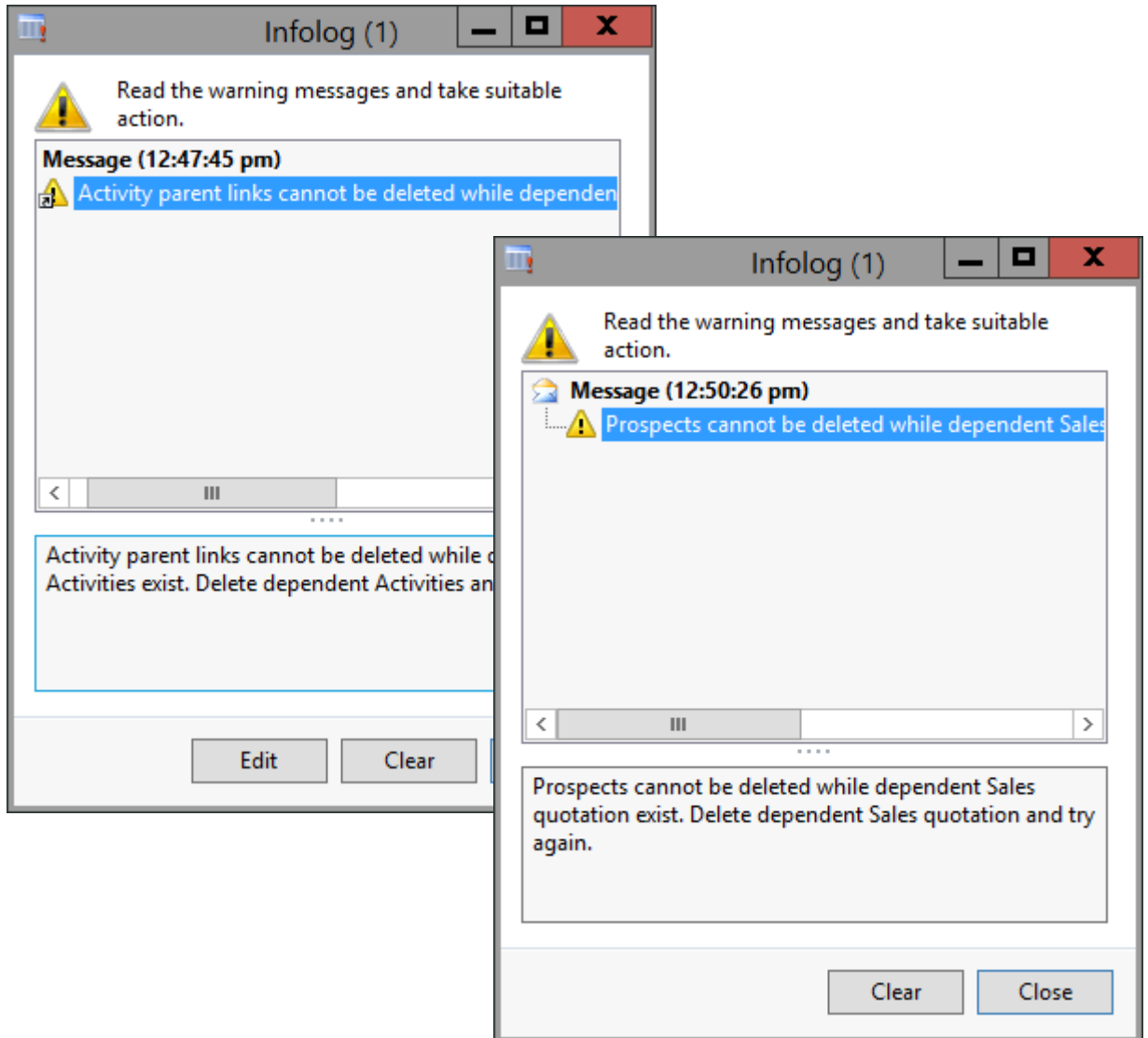
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36. Delete the duplicate with the least good data and fewest linked transactions



You may see messages about blockers (activities, leads, opportunities or quotes) when you try to delete the prospect. In that case navigate to the associated activity etc and contact the owner to see if it can be closed out or updated with the correct prospect/customer.

If the duplicate is already a customer, contact credit controllers





## Task 11. Convert a Prospect to a customer



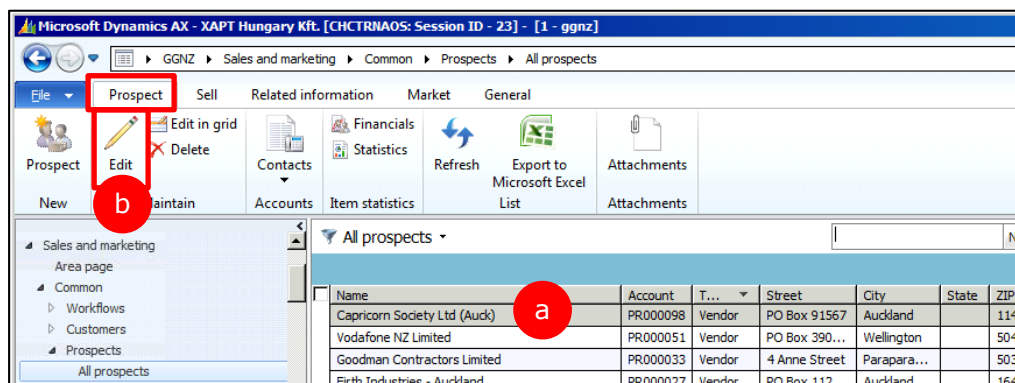
Accounts Receivable steps only

37. Navigate to:

**GGNZ > Sales and marketing > Common > Prospects > All Prospects**

38. Open prospect for editing

- Highlight the Prospect to update
- Select **Prospect > Edit**



### 39. Expand **Miscellaneous details** fast tab, and update the details

- |                               |  |
|-------------------------------|--|
| a. <b>Customer group</b>      | This is normally ' <b>Ext-NZ</b> ' or ' <b>EXT-Cash</b> ' for a cash sale  |
| b. <b>Parent account type</b> | This defaults to <b>Business relation</b> for prospects, but needs to be changed to <b>customer</b> if a Parent account is populated with a customer number  |
| c. <b>Parent account</b>      | If a prospect number is found here delete it. The field should be <b>blank</b> <u>unless</u> the customer is a <b>child account</b> e.g. BT Mining – Rotowaro, and then it must be populated with the child's parent customer account number i.e. BT Mining Ltd's customer number. If the prospect being updated is a parent account itself e.g. BT Mining Ltd, the field should be blank. Used by OLGA. |
| d. <b>Location</b>            | Choose the city  |
| e. <b>Exclude from OLGA</b>   | Leave unticked at all times regardless of status, even for closed or duplicate accounts. Never tick the box. Don't tick it.  |

PR033547 : BT Mining –Rotowaro

General

Addresses

Contact information

Miscellaneous details

One-time customer or vendor: ☐

Status: **ACTIVE**

Invoicing and delivery on hold: **No**

Customer group: **EXT - NZ**

Vendor group:

Hours of business

Opening time: 12:00:00 am

Closing time: 12:00:00 am

Mailing

Do Not Call: ☐

Do Not Mail - Legal: ☐

Do Not Mail - Customer Request: ☐

Do Not Email: ☐

OLGA parameters

Parent account type: **Customer**

Parent account: 3033046

Location:

Exclude private information from OLGA: ☐

Exclude from OLGA: ☐

Inactive: ☐

PR028345 : BT Mining Ltd

General

Addresses

Contact information

Miscellaneous details

One-time customer or vendor: ☐

Status: **ACTIVE**

Invoicing and delivery on hold: **No**

Customer group: **EXT - NZ**

Vendor group:

Hours of business

Opening time: 12:00:00 am

Closing time: 12:00:00 am

Mailing

Do Not Call: ☐

Do Not Mail - Legal: ☐

Do Not Mail - Customer Request: ☐

Do Not Email: ☐

OLGA parameters

Parent account type: **Customer**

Parent account:

Location: **CHRISTCHURCH**

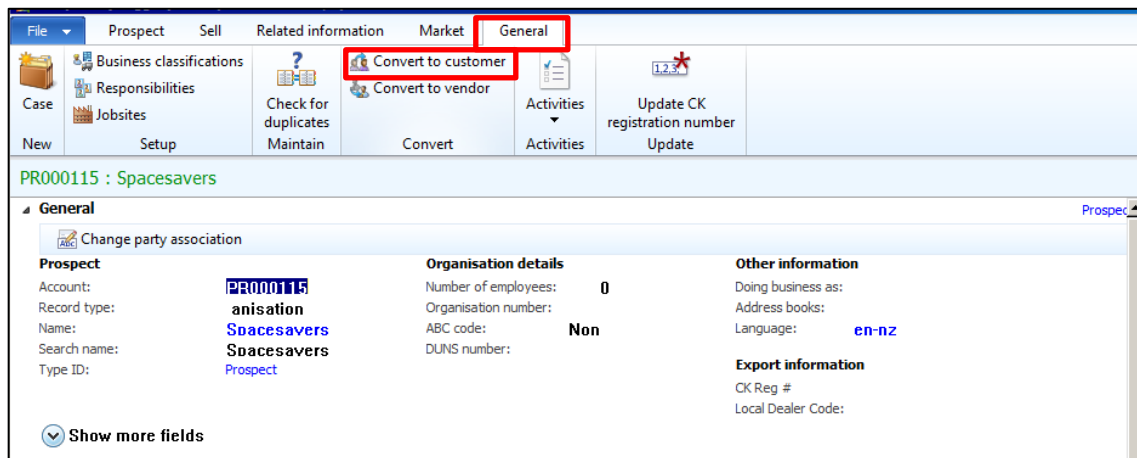
Exclude private information from OLGA: ☐

Exclude from OLGA: ☐

Inactive: ☐

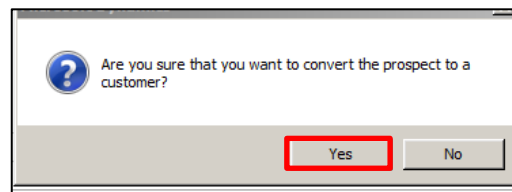
#### 40. Select **General > Convert to customer**

A notification window will display asking for confirmation to convert the Prospect to a customer



The screenshot shows the CRM software interface. The top navigation bar includes 'File', 'Prospect', 'Sell', 'Related information', 'Market', and 'General'. The 'General' tab is selected. Below the navigation bar, there are several icons and buttons. The 'Convert to customer' button is highlighted with a red box. Below the navigation bar, the main area displays the 'General' tab for the prospect 'PR000115 : Spacesavers'. The 'General' tab contains sections for 'Prospect', 'Organisation details', 'Other information', and 'Export information'. The 'Prospect' section shows 'Account: PR000115', 'Record type: anisation', 'Name: Spacesavers', 'Search name: Spacesavers', and 'Type ID: Prospect'. The 'Organisation details' section shows 'Number of employees: 0', 'Organisation number:', 'ABC code: Non', and 'DUNS number:'. The 'Other information' section shows 'Doing business as:', 'Address books:', 'Language: en-nz', and 'Export information' with 'CK Reg #' and 'Local Dealer Code:'.

#### 41. If you are sure, select **Yes**



The screenshot shows a confirmation dialog box with a question mark icon and the text 'Are you sure that you want to convert the prospect to a customer?'. Below the text are two buttons: 'Yes' and 'No'. The 'Yes' button is highlighted with a red box.



Shared services will pick up this new customer record from a NAXT cue and complete the process of setting up a new customer.

## What next?

Create an opportunity

**CRM\_2.2\_Create and Update an Opportunity**