SOP

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.

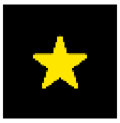
Different information is recorded for a Prospect, a customer or a contact; for example, decision-makers and influencers are recorded as a contact and a business who will potentially make a purchase is recorded as a Prospect. These records can all be linked and share information if required.

What is covered in this guide

Terminology

Prospect	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
Customer	A Customer is a person who buys goods or services from us. A Customer record is required "to do business"
Contact	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
Contact Information	The details that can be used to contact a Prospect, customer or contact
Equipment	Machinery or equipment linked to a Prospect or customer

Use of icons

	**Business rule**		**Key point / Tips**		**Information**

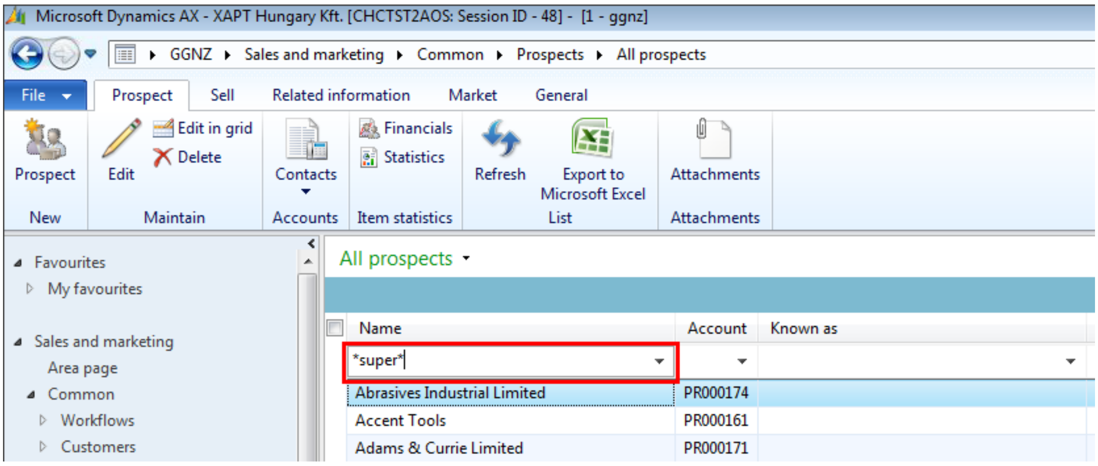
Task 1. Find a Prospect

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**

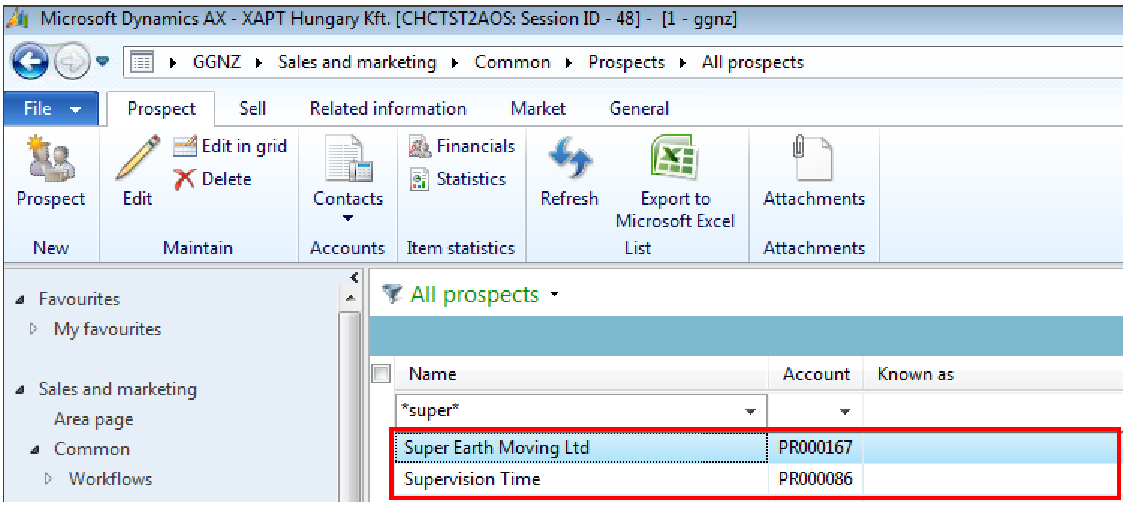
   Any Prospect records matching your search will display



! 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

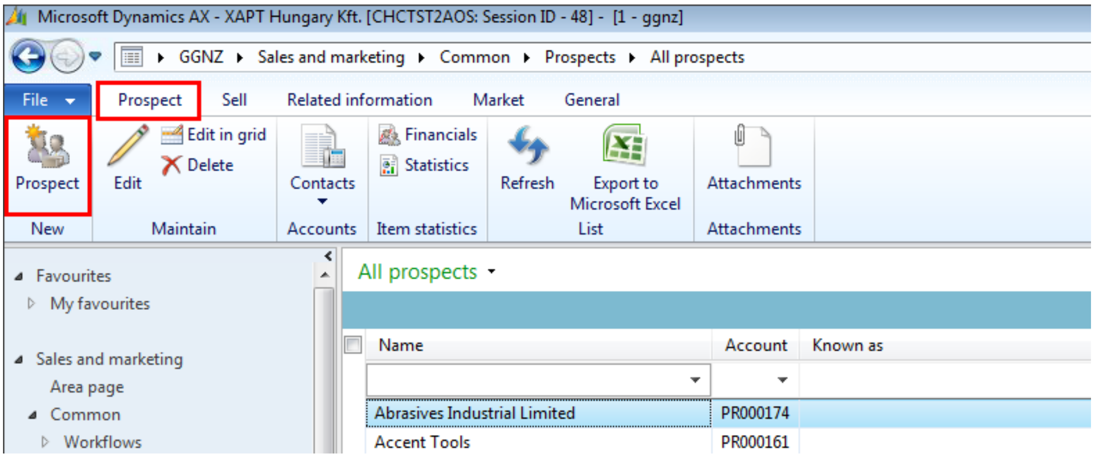


Task 2. Create a Prospect record

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.

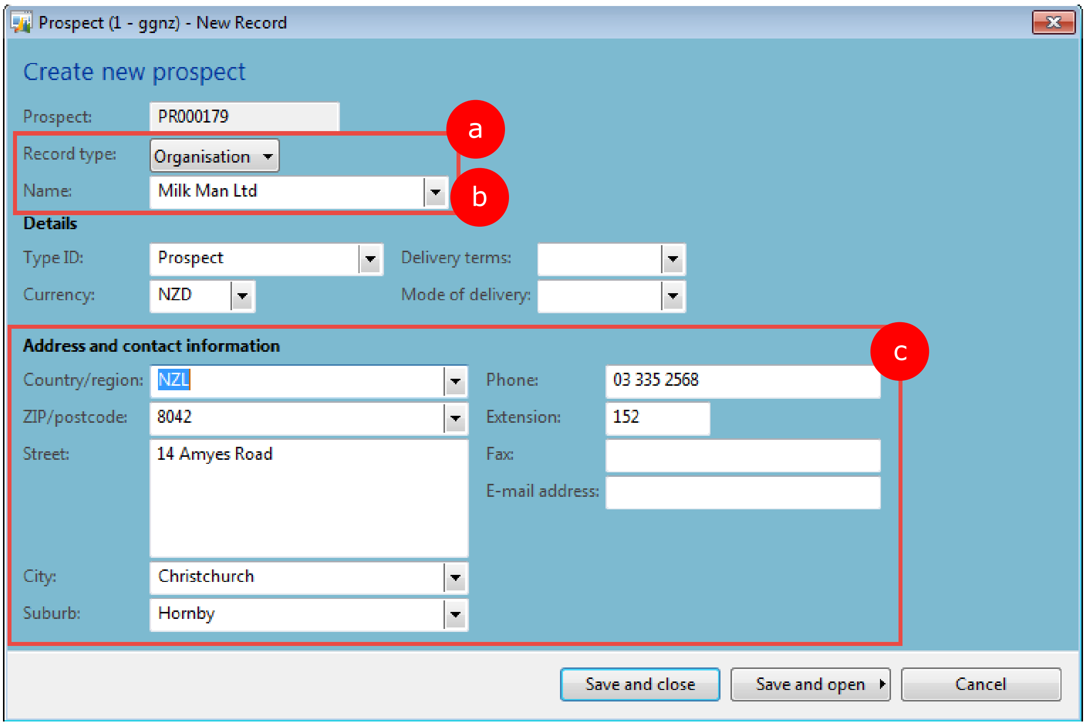
5. Select **Prospect > Prospect**

   The **Create new Prospect** window will display



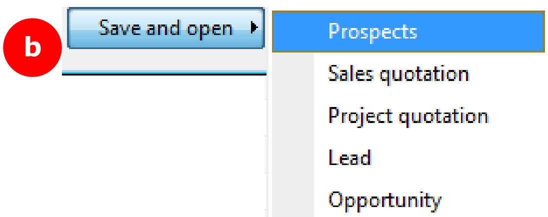
6. Complete the following fields:

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



7. There are three ways to complete this procedure:

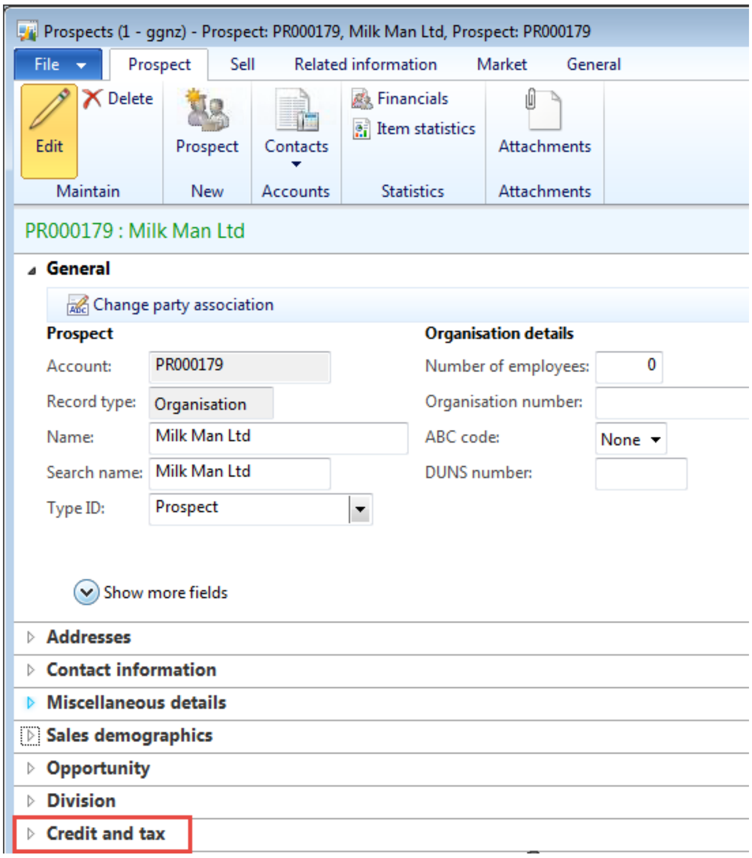
a. **Save and close:** This will save the new Prospect and take you back to the **All Prospects** window
b. **Save and open:** If you want to open the Prospect record, a sales or project quote, a lead or a new opportunity you can do this directly by clicking on **Save and open** and then selecting from 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

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

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



9. Set the **Tax** field to 'GST'

Task 4. Add address information to Prospect record

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

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

11. Select **Add**

    The **New address** window will display

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'

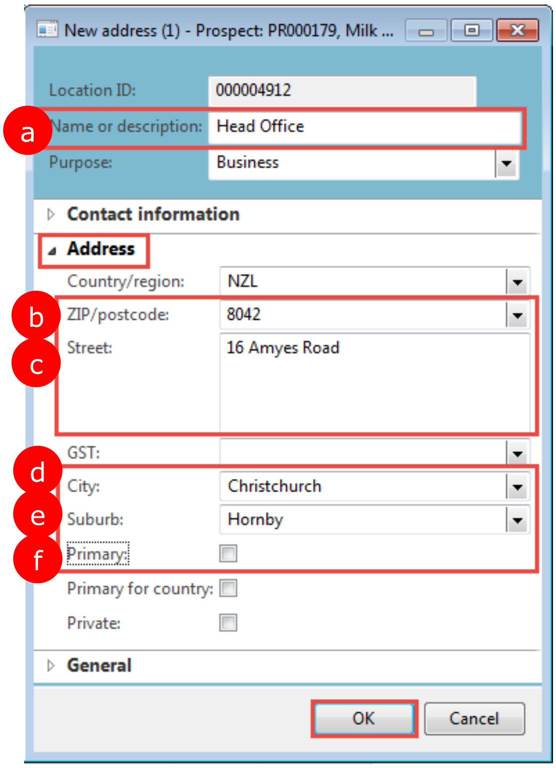
b. **ZIP/postcode** — This field is required to ensure the correct region is populated. It helps to make mail-outs straightforward. City and District (Suburb) then auto-populates
The District field should show your correct suburb. If incorrect, use the ZIP/postcode drop-down to change
User must select 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

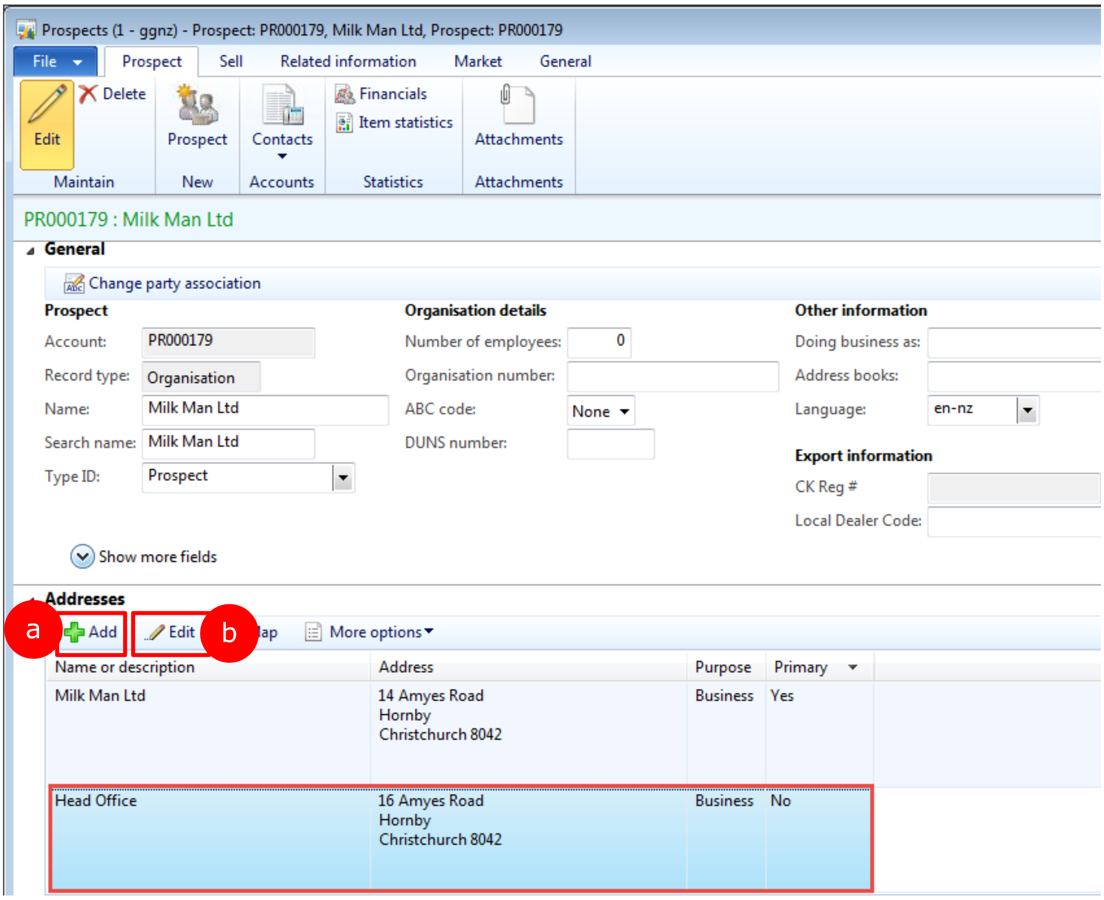
f. **Primary** — If this is the first address you are entering the **Primary** checkbox will default with a tick. Update this as required

g. Select **Ok**



13. Amend or add current addresses as necessary

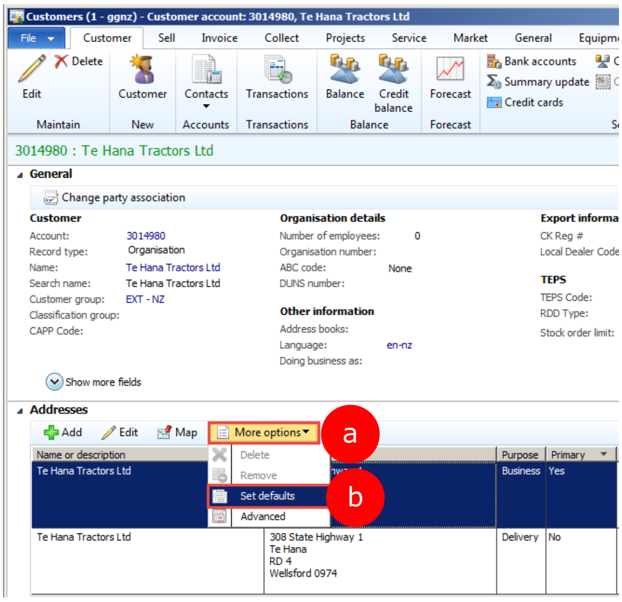
   a. Select **Edit** icon
   b. Select **Add** icon



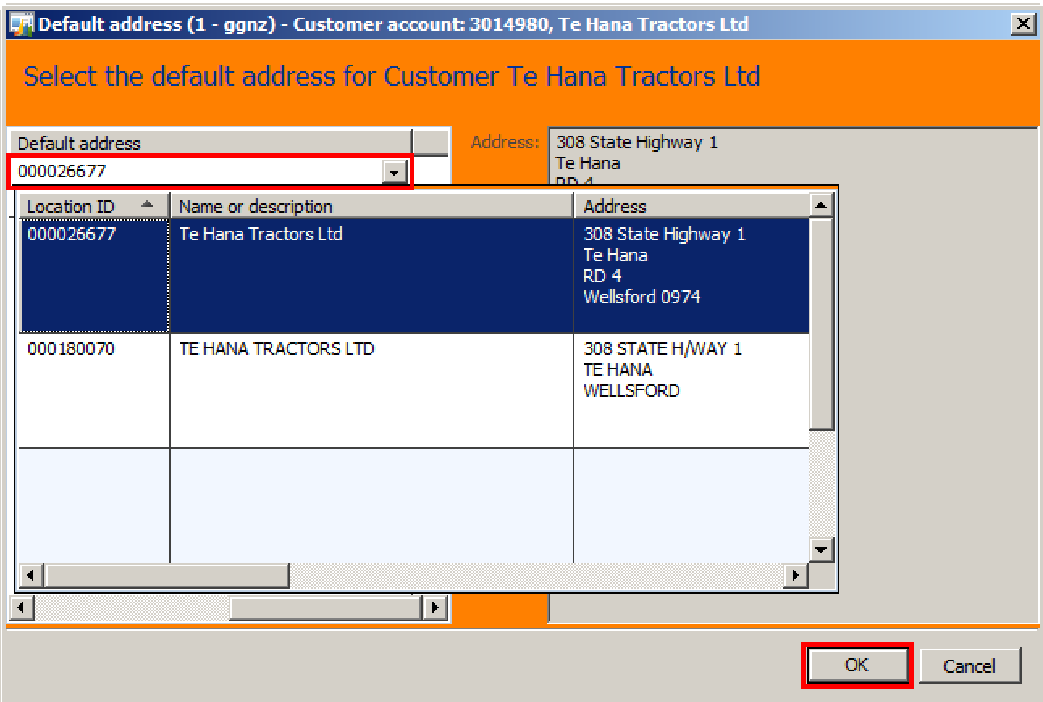
14. When there are multiple delivery addresses a default delivery address can be set;

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

   The **Default address** selection window will appear



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



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.**

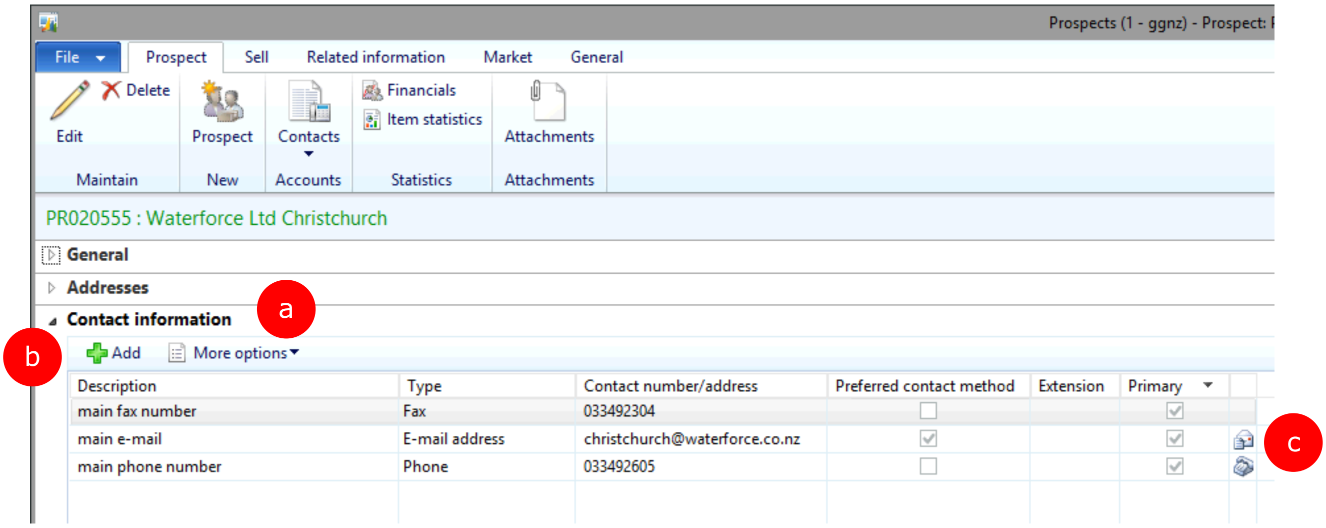
17. To add general contact information for the Prospect, go to Step 19

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

19. Add general contact information:

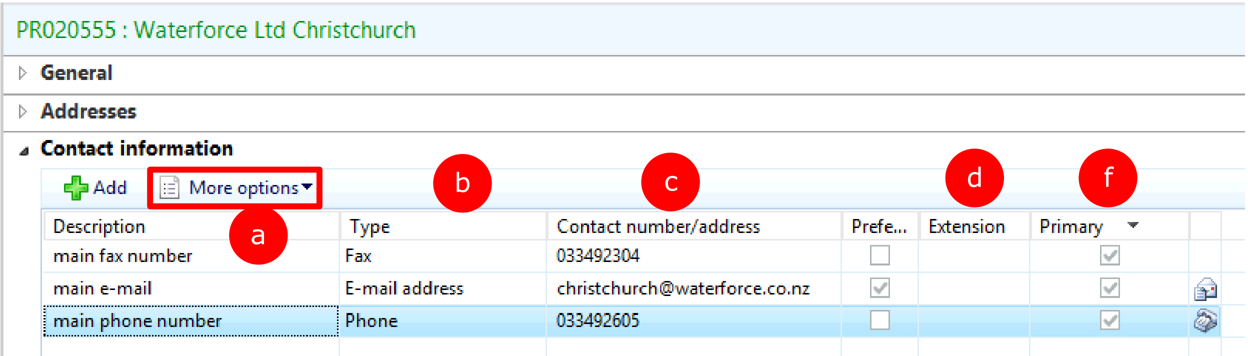
    a. Expand Contact information fast tab
    b. Select **Add**
    c. Make sure the **Preferred contact method** tickbox is ticked on the same row that **Primary** is ticked. If there is only one row here, tick the box.

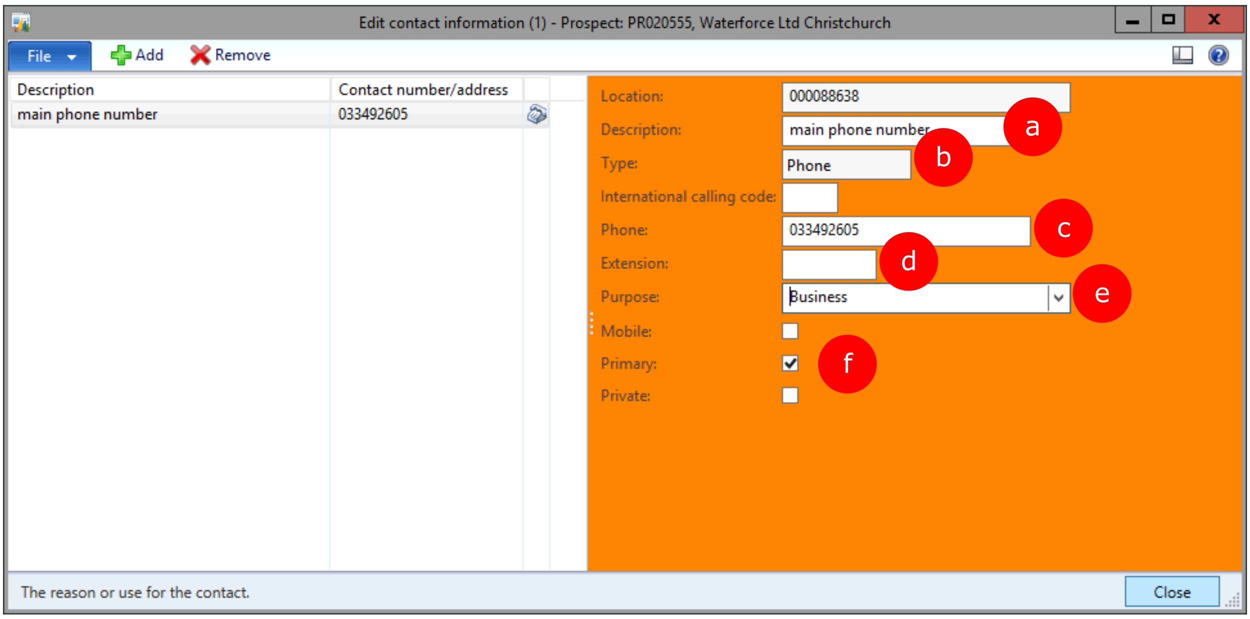
    A new contact line will display



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



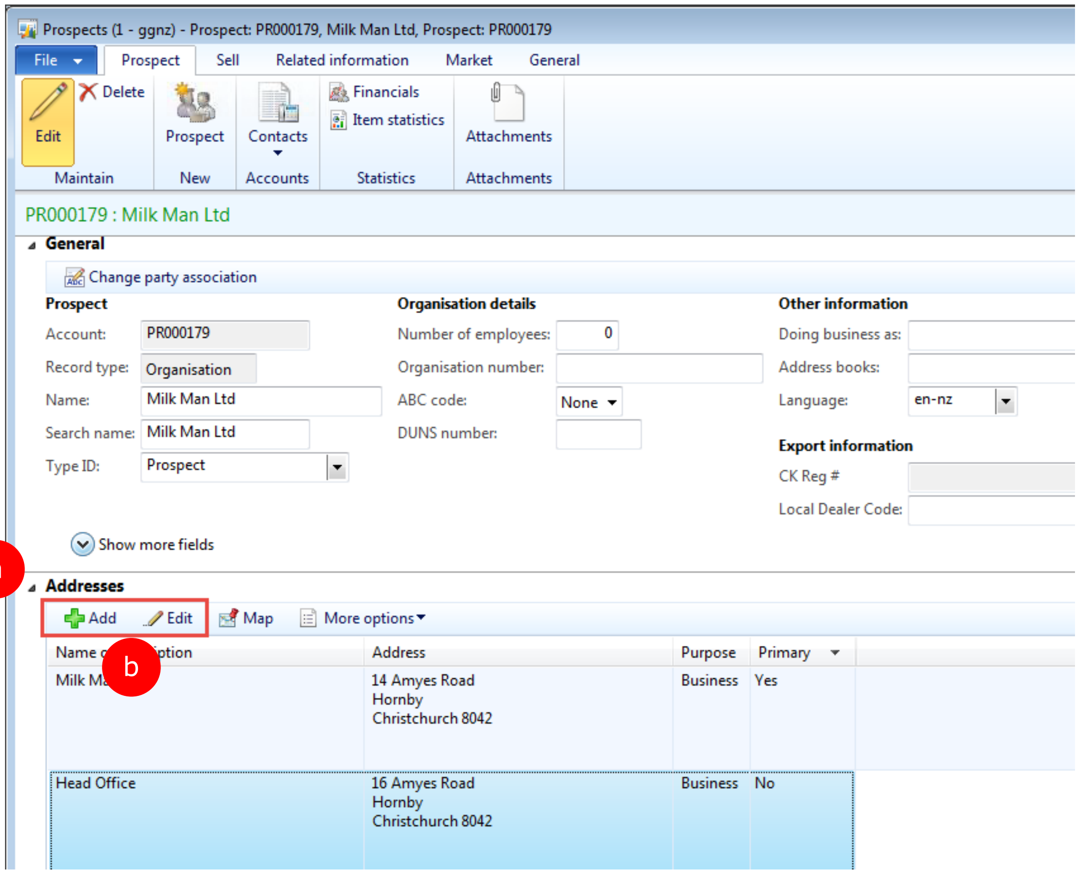


! Selecting the primary box will ensure the contact number/ email show on your filtered lists, **"All Prospects"** or **"My Prospects"** etc. Only one of each "type" can be primary e.g. 1 x phone, 1 x email.

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



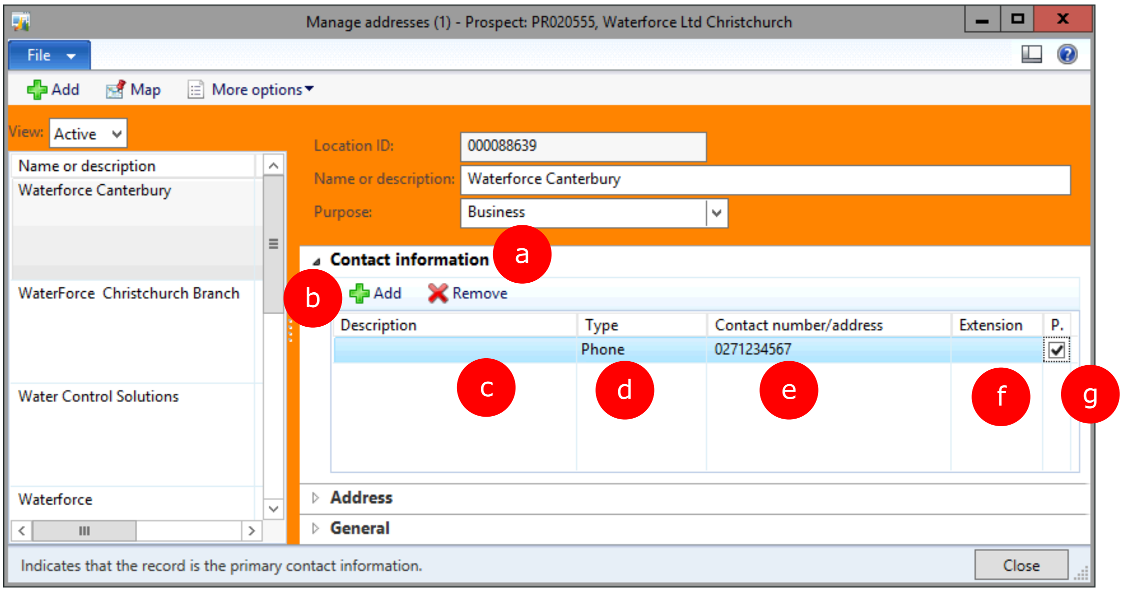
22. Add a new contact,

    Select the following;

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

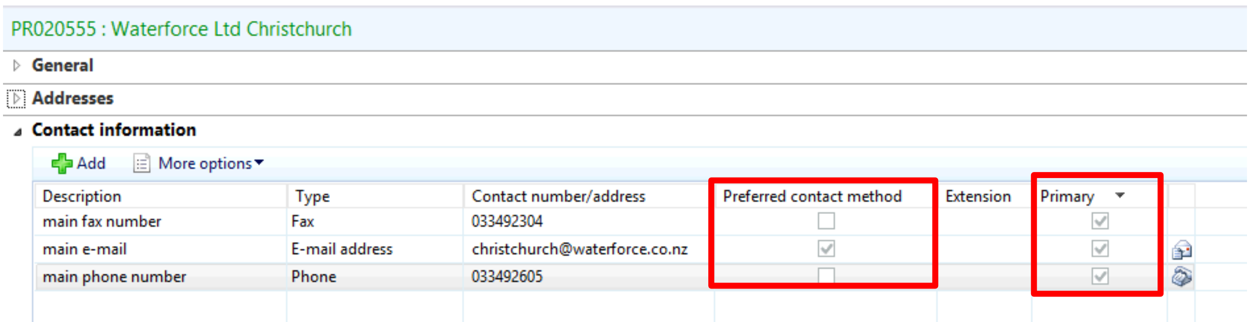
    Enter the following;

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



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

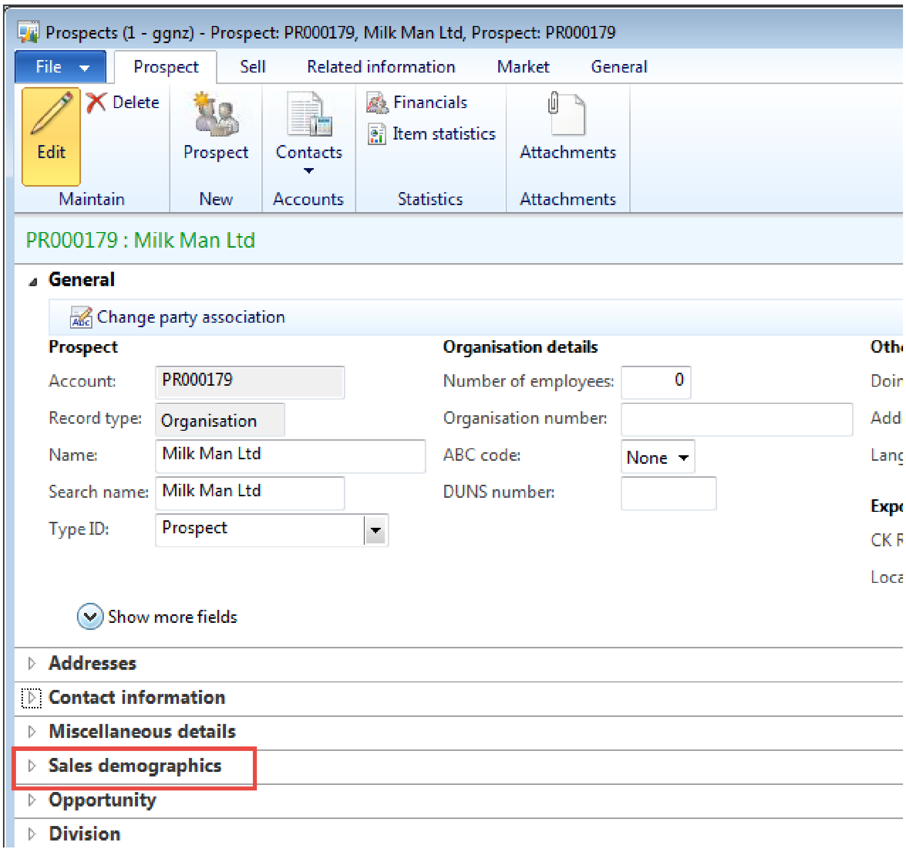
24. Go to **Contact information** fast tab and make sure the **Preferred contact method** tickbox is ticked on the same row that **Primary** is ticked. If there is only one row here, tick the box



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

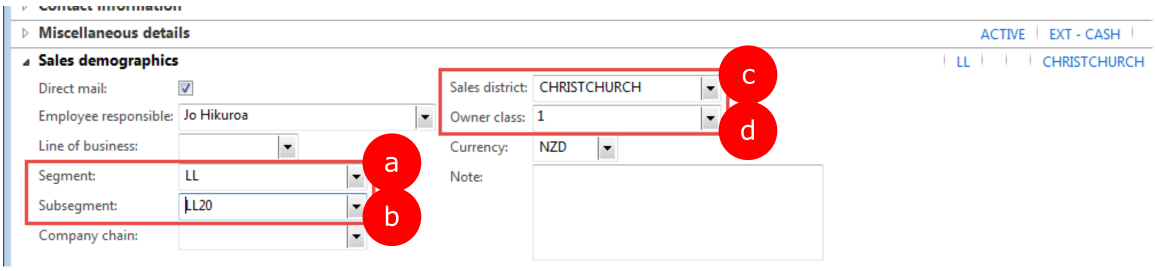
25. On the **Prospects** window, expand **Sales demographics** fast tab

    The **Sales demographics** fast tab will display



26. Complete the following fields:

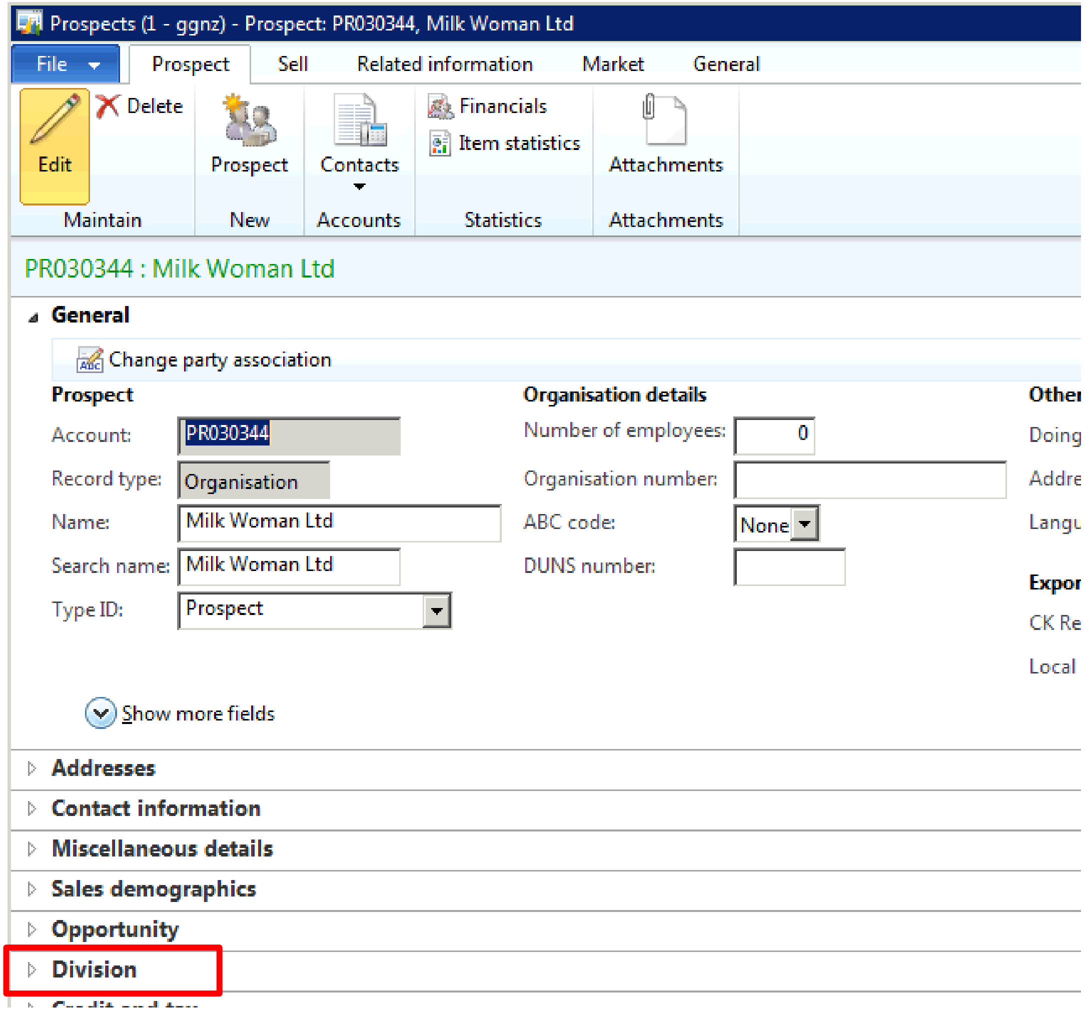
a.	**Segment**	Select what type of business the company is, such as 'local contractor'
b.	**Subsegment**	Select what type of business the company does, such as 'landscaping'
c.	**Sales district**	Assign the Prospect to a sales district, such as 'Christchurch' etc.
d.	**Owner class**	Select whether the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



Task 7. Add division to a Prospect record

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

    The **Division** fast tab will display



28. Complete the following fields:

a. **Primary** — Tick the box for the one division the customer would work with most (Mandatory)

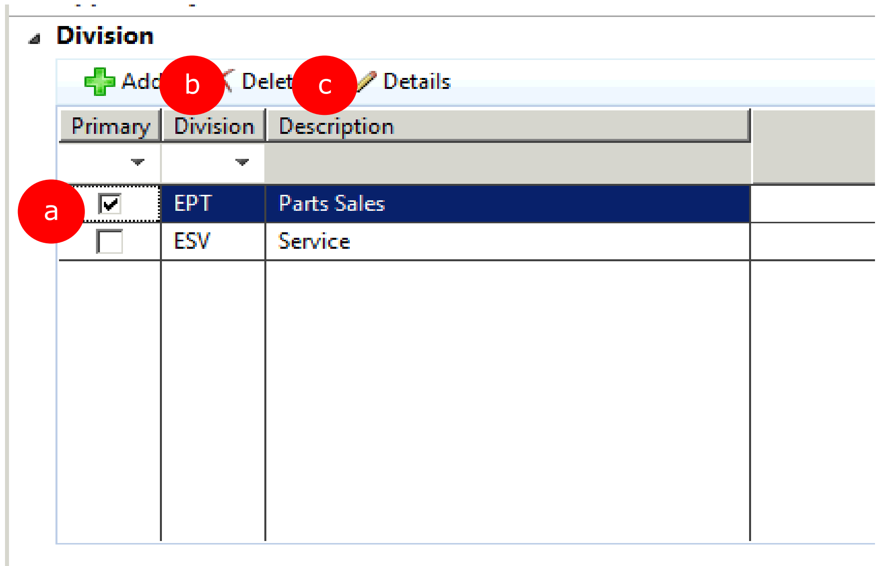
b. **Division** — Add the divisions the customer would work with:

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



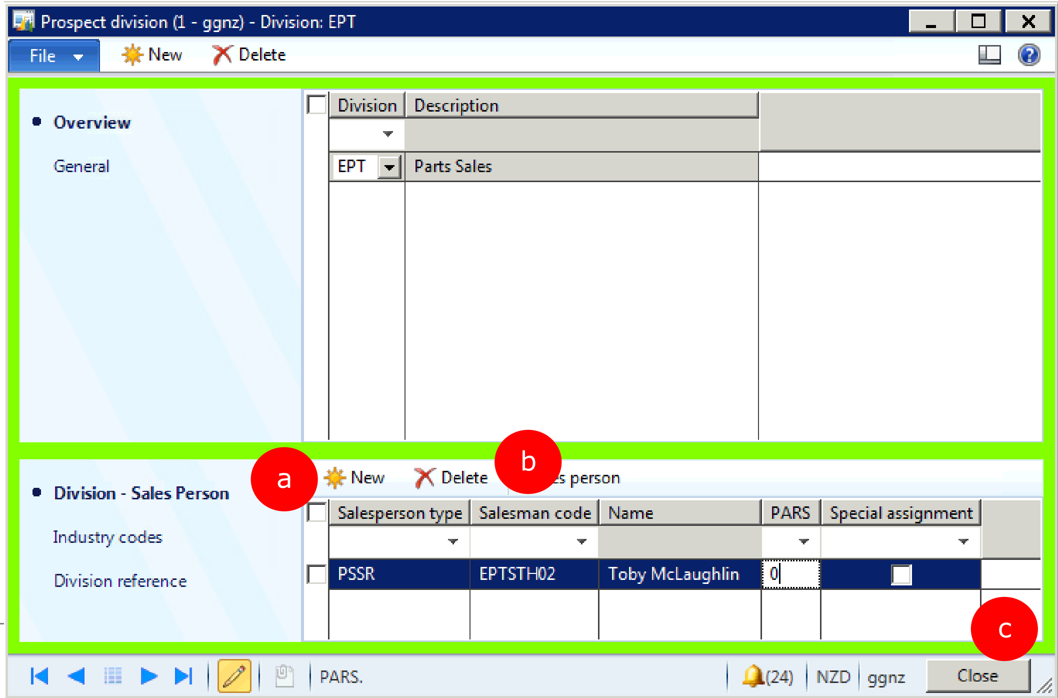
29. Select **New** then update Prospect division

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.

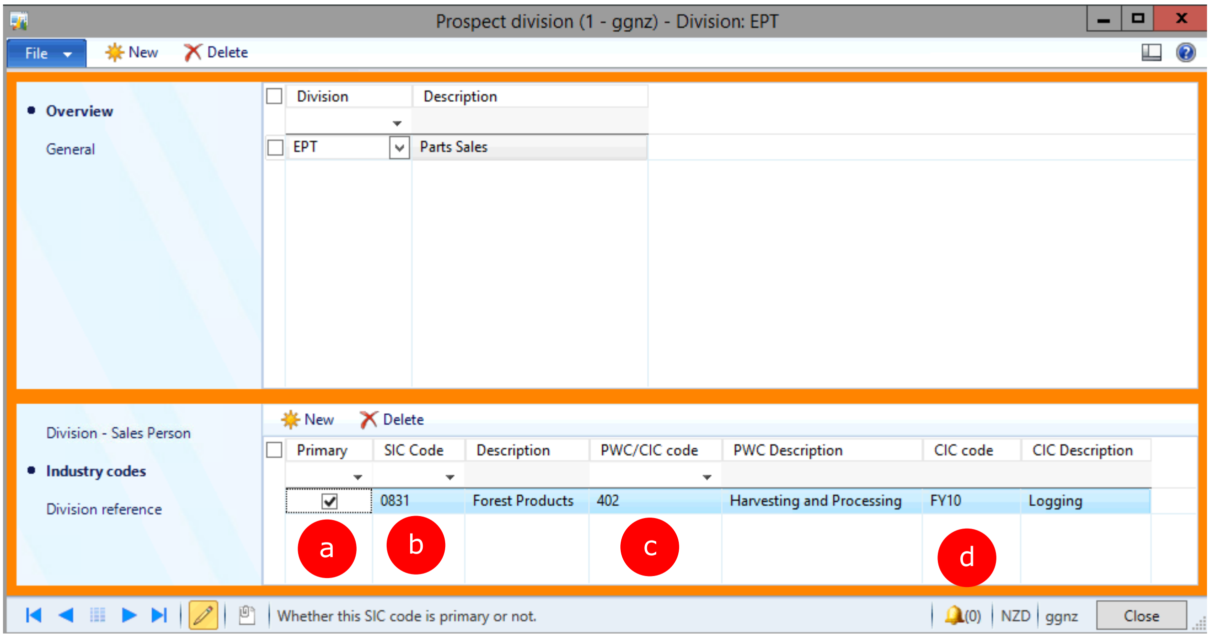
c. **PARs** — This indicates the number of times the sales rep contacts the customer in a year. PAR = Planned Annual Rate. It should not be zero.

d. **Close**



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



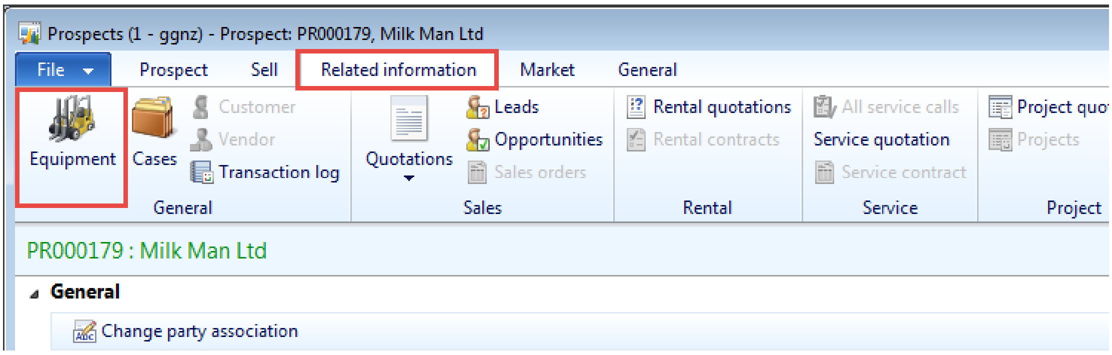
Task 8. Link equipment to a Prospect record

These steps are identical to part of the process covered in **SLS 6.4 Load and Maintain Equipment Population CSC**

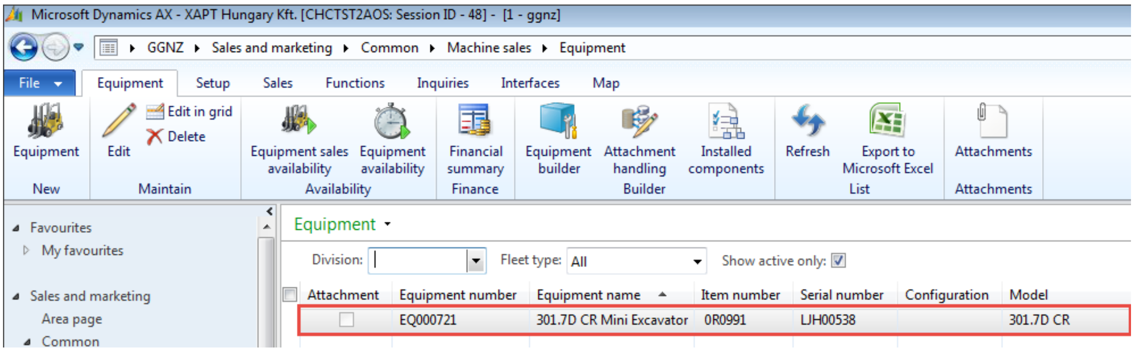
Task 9. Check the equipment item is linked to the Prospect record

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

32. Select **Related information > Equipment**



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

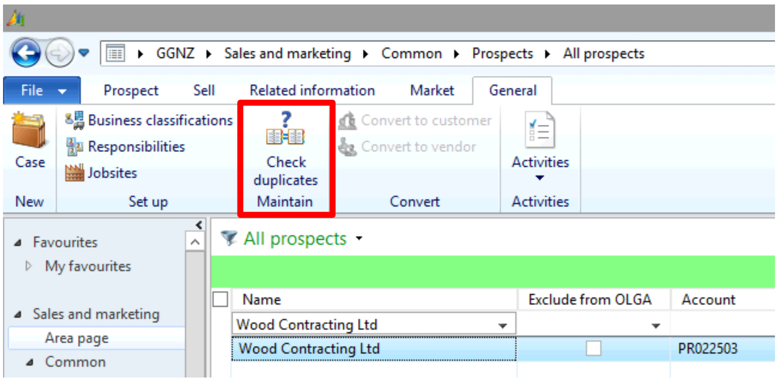


Task 10. Check for duplicates

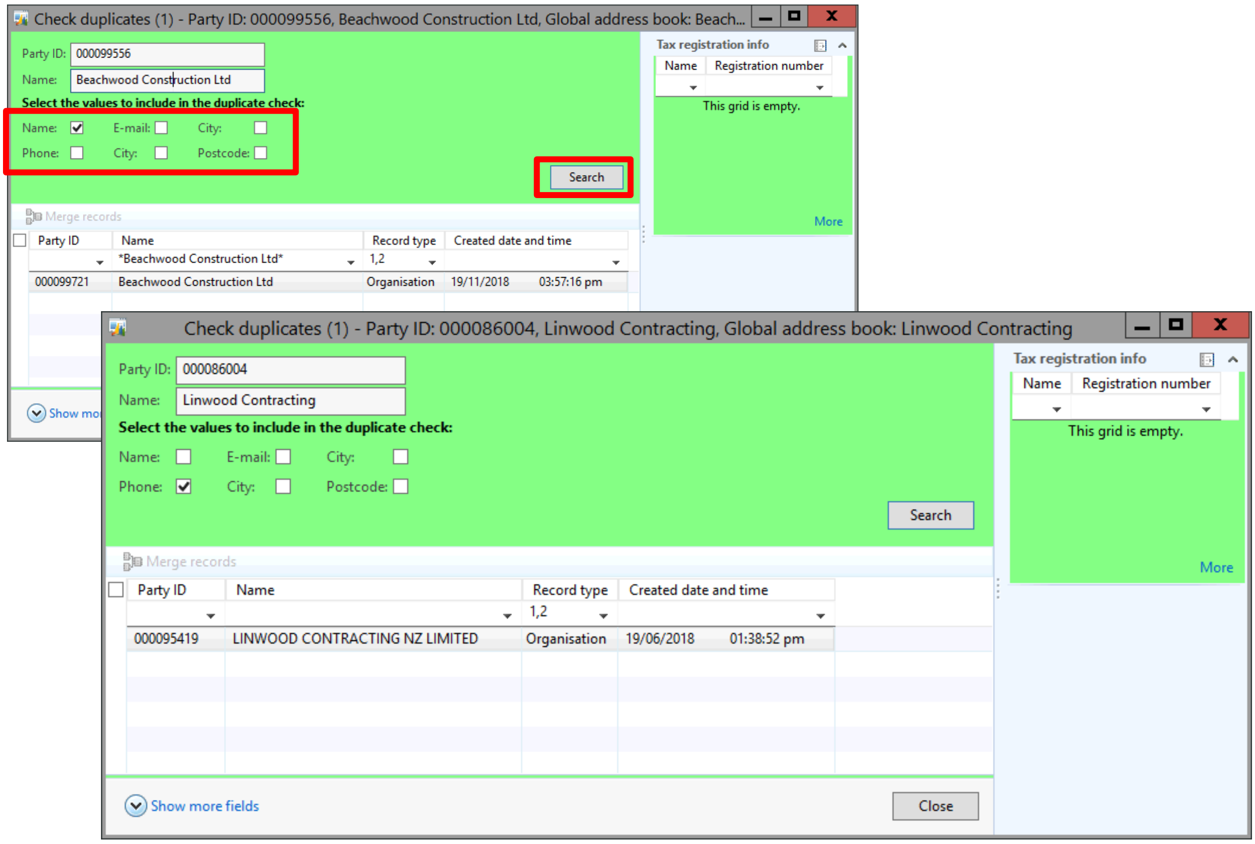
33. Navigate to:

    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**



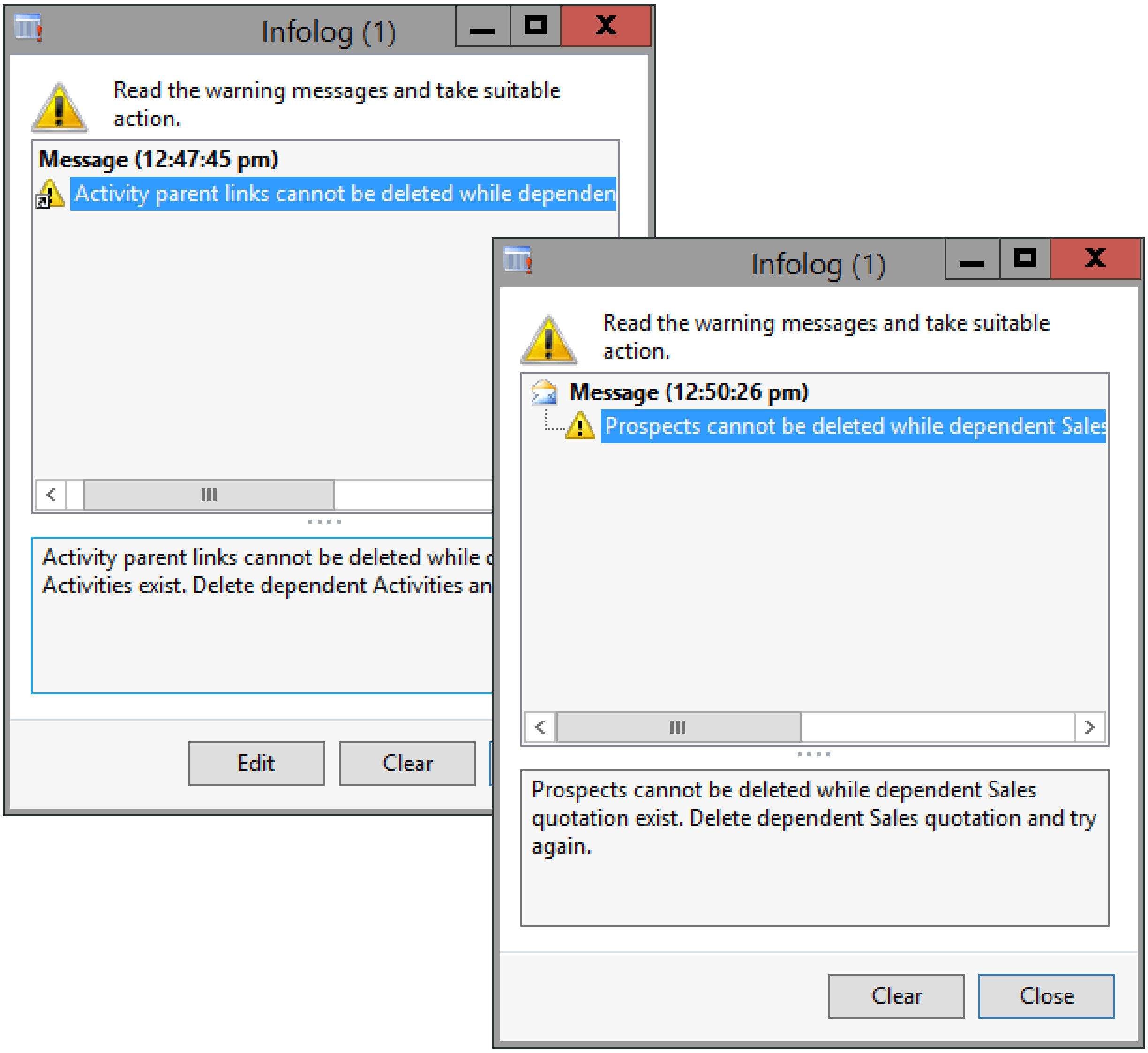
35. Use the tick boxes and select **Search** to find duplicates



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

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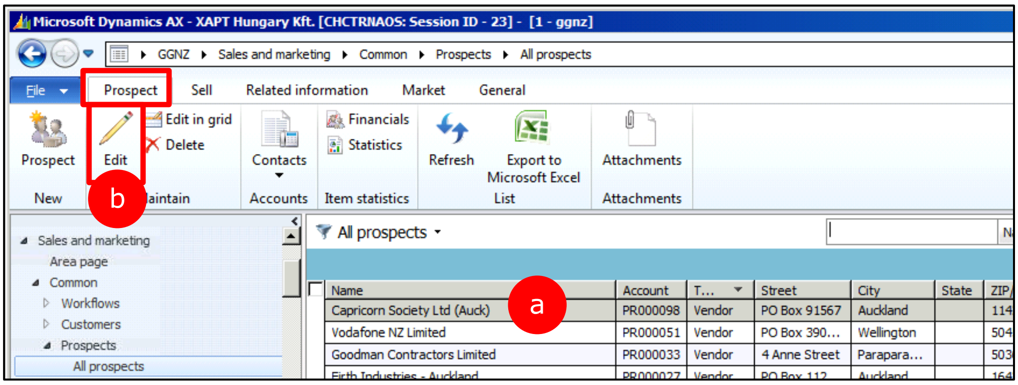
38. Open prospect for editing

    a. Highlight the Prospect to update
    b. Select **Prospect > Edit**



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

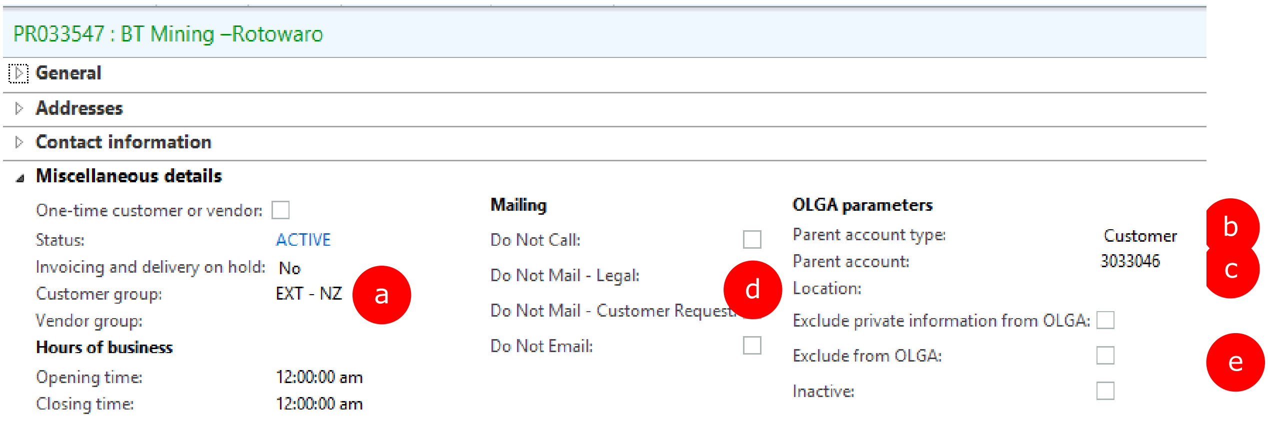
a. **Customer group** — This is normally **'Ext-NZ'** or **'EXT-Cash'** for a cash sale

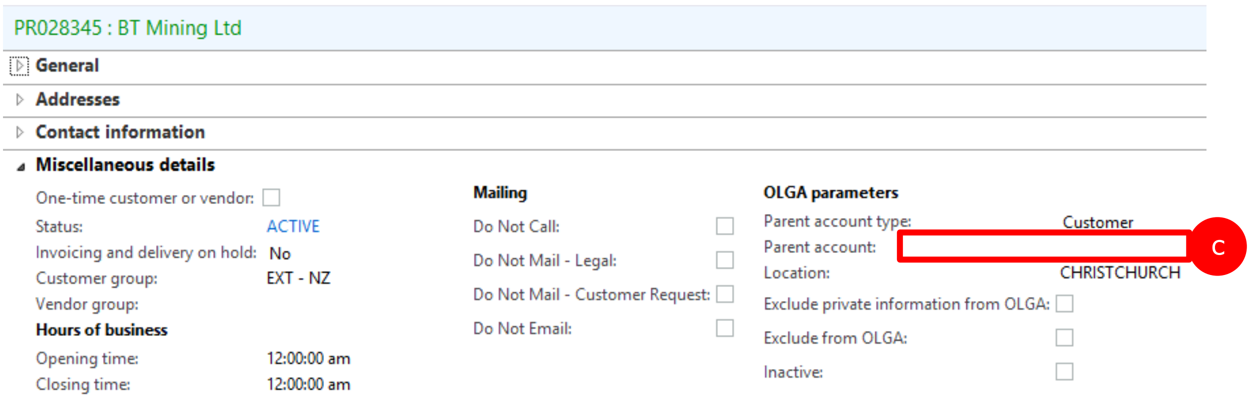
b. **Parent account type** — This defaults to **Business relation** for prospects, but needs to be changed to **customer** if a Parent account is populated with a customer number

c. **Parent account** — If a prospect number is found here delete it. The field should be **blank** <u>unless</u> the customer is a **child account** 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. **Location** — Choose the city

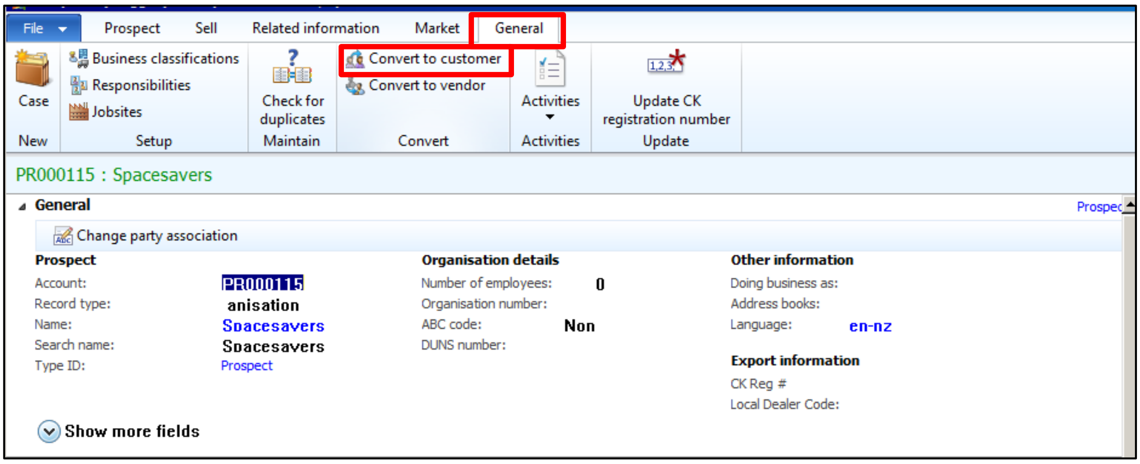
e. **Exclude from OLGA** — Leave unticked at all times regardless of status, even for closed or duplicate accounts. Never tick the box. Don't tick it.



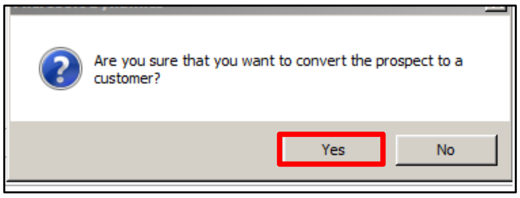


40. Select **General > Convert to customer**

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



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



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**