

WORK INSTRUCTION

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DOC NUMBER: D0061964

REVISION: -

OWNER: Customer Service

REV. DATE: 04/03/2017

PROSPECT ACCOUNT SET UP

TRIGGER EVENT:

A new qualified lead requests an estimate.

PURPOSE:

The purpose of this document is to record the SyteLine steps required to capture a business' or individual's logistics, thereby categorizing them as a Prospect.

PROCESS:

Quote to Cash

PROCESS STEP(s):

Quote

REFERENCE:

- ISO 9001 Quality Management Systems – Requirements
- D0059944 Quote
- D0061965 Creating an Estimate from a Prospect Account

APPLICABILITY:

Sales and Customer Service

RESPONSIBILITY and ACCOUNTABILITY:

Sales and **Customer Service** staff are responsible for creating a Prospect within SyteLine.

DEFINITIONS:

Qualified Lead – A prospective consumer of a product or service, created when an individual or business shows interest and provides contact information to the seller.

Prospect – A qualified lead or potential client which has expressed interest in the products and services of the seller, and has requested a formal estimate.

PROCEDURE:

1. Log into SyteLine
2. Open **Prospects** form

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3. Click on the **Filter in Place** button



Prospect: sBiCrmCompany1

Company:

Address [1]: Salesperson:

Address [2]: Language:

Address [3]: SIC:

Address [4]: Currency:

City: Prov/St:

Postal/ZIP: County:

Country: EU Code:

Territory:

Sales Team:

Phone: Pref Geo Code:

Internet URL:

Corporate Cust:

Company Revenue: Number Of Employees:

Created By: Create Date:

4. Begin a new entry (**CTRL + N**)
5. Enter the lead's company information into the prospect header detail: (Must be typed in all capital letters)
- Prospect field – Tab through (Prospect number will be system generated once saved)
 - Company field – Company name
 - Address field(s) – Shipping address
 - City field – Shipping address city location
 - Prov/St field – Province or State location
 - Postal/ZIP field – Postal or ZIP code
 - Country field – From the dropdown menu select country where product will ship to. (United States must be typed in, not in the dropdown menu.)
 - Territory field – From the dropdown menu select appropriate territory code.
 - Corporate Customer field – If applicable, add the corporate account number or select from the dropdown menu.
 - Salesperson field – From the dropdown menu select the appropriate regional manager.

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k. Currency field – Defaults to USD

The screenshot shows a form for setting up a prospect account. The form includes the following fields and callouts:

- a. Prospect Field:** Points to the Prospect dropdown menu.
- b. Company Field:** Points to the Company text field.
- c. Address Field:** Points to the Address [1] through [4] text fields.
- d. City Field:** Points to the City text field.
- e. Prov/St Field:** Points to the Prov/St dropdown menu.
- f. Postal/Zip Field:** Points to the Postal/ZIP text field.
- g. Country Field:** Points to the Country dropdown menu.
- h. Territory Field:** Points to the Territory dropdown menu.
- i. Corp. Cust. Field:** Points to the Corporate Cust. dropdown menu.
- j. Salesperson Field:** Points to the Salesperson dropdown menu.
- k. Currency Field:** Points to the Currency dropdown menu, which is currently set to USD.

Other visible fields include: Language, SIC, County, EU Code, Sales Team, Phone, Internet URL, Pref Geo Code, Company Revenue (0.00), Number Of Employees (0), and Created By (Laura Roby). A Validate button is also present.

6. Click on Codes tab

- Tax Code text field – From the dropdown menu select the appropriate tax code. (Contact Accounts Receivable personnel for correct tax code information)

The screenshot shows the same form as above, but with the **Codes** tab selected in the navigation bar. The **a. Tax Code Field** callout points to the Tax Code dropdown menu.

Note: You can't create an estimate from a prospect account without having a tax code noted.

7. Save form (CTRL + S)

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REVISION	DATE	DESCRIPTION OF CHANGE
-	04/03/2017	Initial release