| Company Logo Here | **WORK INSTRUCTION** | | | |
|---|---|---|---|---|
| | **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.

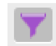
**DEFINITIONS:**

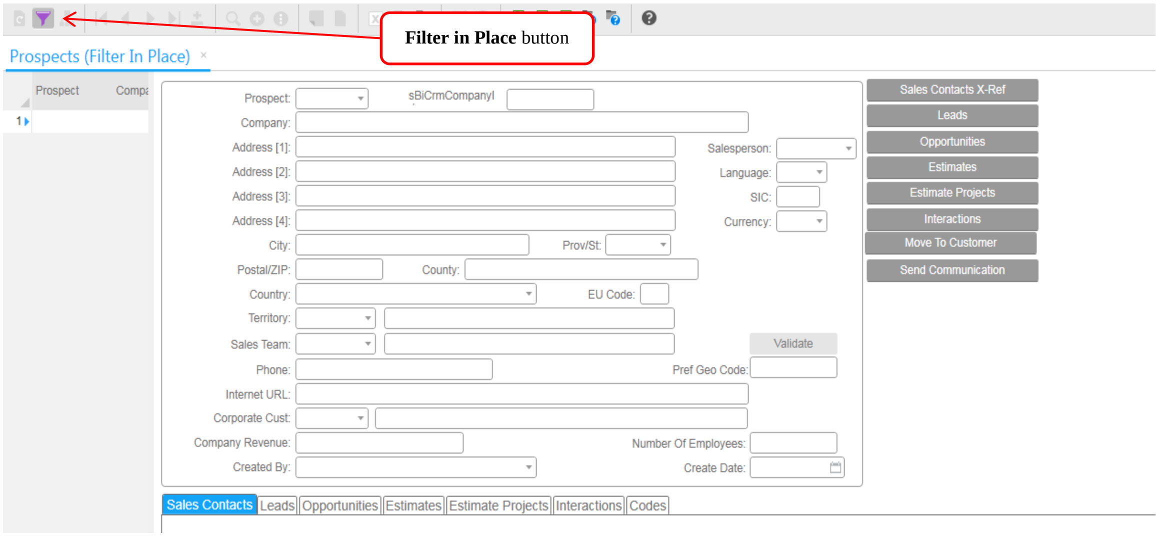
**Qualified Lead** – A prospective consumer of a product or service, created when an individual or business shows interest and provides contact information to the seller.

**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:**

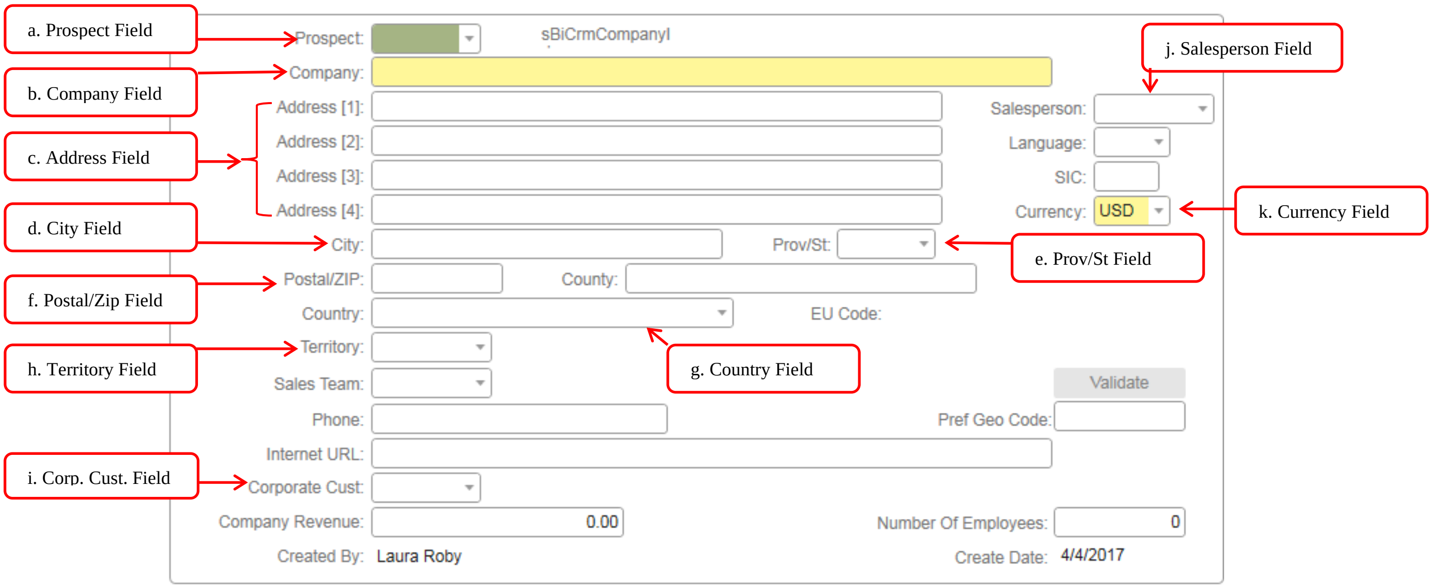
1. Log into SyteLine
2. Open **Prospects** form

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

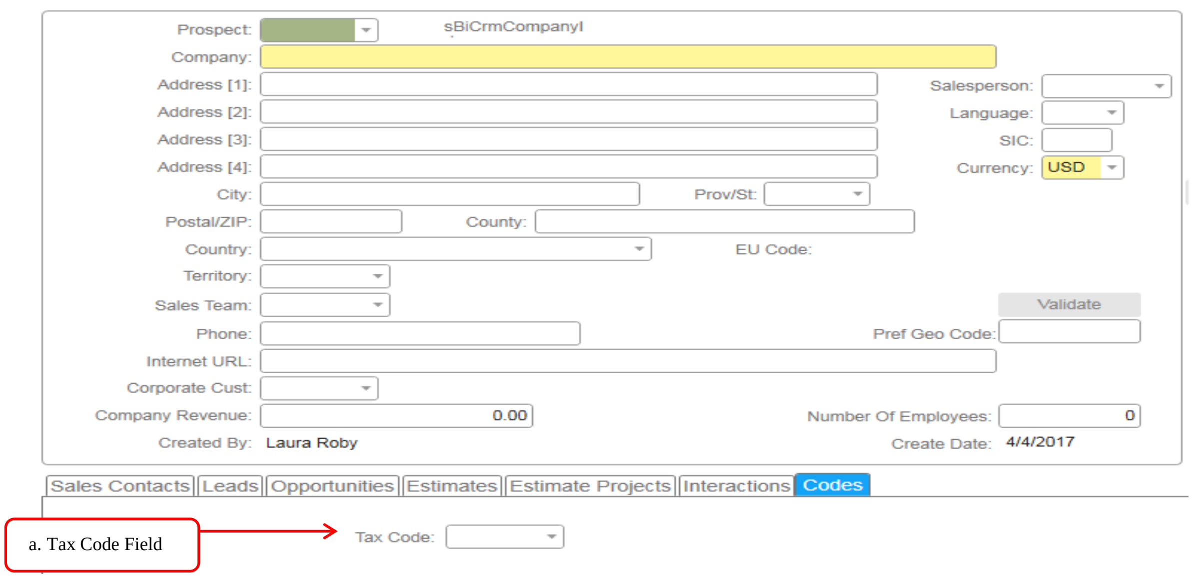



4. Begin a new entry (**CTRL + N**)
5. Enter the lead's company information into the prospect header detail: (Must be typed in all capital letters)
   a. Prospect field – Tab through (Prospect number will be system generated once saved)
   b. Company field – Company name
   c. Address field(s) – Shipping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

k. Currency field – Defaults to USD




6. Click on Codes tab
   a. Tax Code text field – From the dropdown menu select the appropriate tax code. (Contact Accounts Receivable personnel for correct tax code information)




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

7. Save form (**CTRL + S**)

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