

Create Prospect

1. From **CRM** module, click **Sales Entities**. Sales Entity screen will appear.
2. Click **New** toolbar button. Create New Entity screen will appear:
3. Provide entity details then click **Find Duplicates** button. Duplicate Entities screen will appear, click **Add** button to proceed.
4. Once entity screen appears, provide the required fields.

Prospect - Sample Prospect 1

New Save Search Delete Undo Convert ▾ Additional ▾ Close

Entity Prospect General Locations Contacts Split History Messages Activities Attachments Audit Log Entity Type

Name * Sample Prospect 1 Phone Entity No 1006456

Contact Name ▾ Sample Prospect 1_Contact Suffix Email Prospect@test.com Mobile

Class

Location Name ▾ 01 Printed Name Sample Prospect 1

Search Address Enter address to search...

Address Makati, PH

City Makati State PH

Zip/Postal 1002 Country Philippines

Time Zone (UTC+08:00) Kuala Lumpur, Sin, Language English

Document Delivery

External ERP ID Origination Date 3/22/2018

Contact Information

+ Insert X Remove Types

Type* Details*

Line of Business

+ Insert X Remove Types

Line of Business Salesperson

Internal Notes

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5. Click **Save** button to create Prospect.