

Convert Prospect

1. From **CRM** module, click **Sales Entities**. Sales Entity screen will appear.
2. Open Prospect you want to convert into a Customer.

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, Singapore Language English

Document Delivery

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Line of Business

+ Insert X Remove Types	
<input type="checkbox"/>	Line of Business Salesperson
<input type="checkbox"/>	

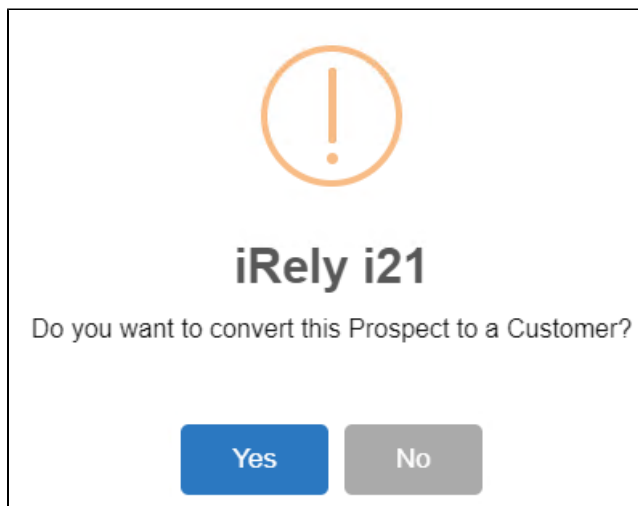
Contact Information

+ Insert X Remove Types	
<input type="checkbox"/>	Type* Details*
<input type="checkbox"/>	

Internal Notes

? 4.74s Saved Page 1 of 1 Refresh

3. Click **Convert** then click Customer.



4. Click **Yes** to proceed.
5. Once converted, check the Entity type. It should be Customer.
6. Prospect can also be converted into a Lead. Click **Convert** then click Lead and Yes.



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Do you want to convert this Prospect to a Lead?

Yes

No