# Merging Prospects with Customers

New accounts that have been setup within the CRM are considered Prospects. Prospects that have been only setup in the CRM can be identified by their Customer Number. These customer numbers can be seen because they start with the letter 'P' and then follow within a timestamp of when the prospect was created.

For example. The Prospect customer number "P200914092023-1" was created in 2009 on September 14th, at 20:23 military time.

Once this Prospect becomes an account within ACS this prospect should be merged with the new customer number setup in ACS. The merge process will bring all contacts and activity currently associated with the prospect over to the customer.

Ideally this task is to be performed by the accounting person entering this customer into ACS.

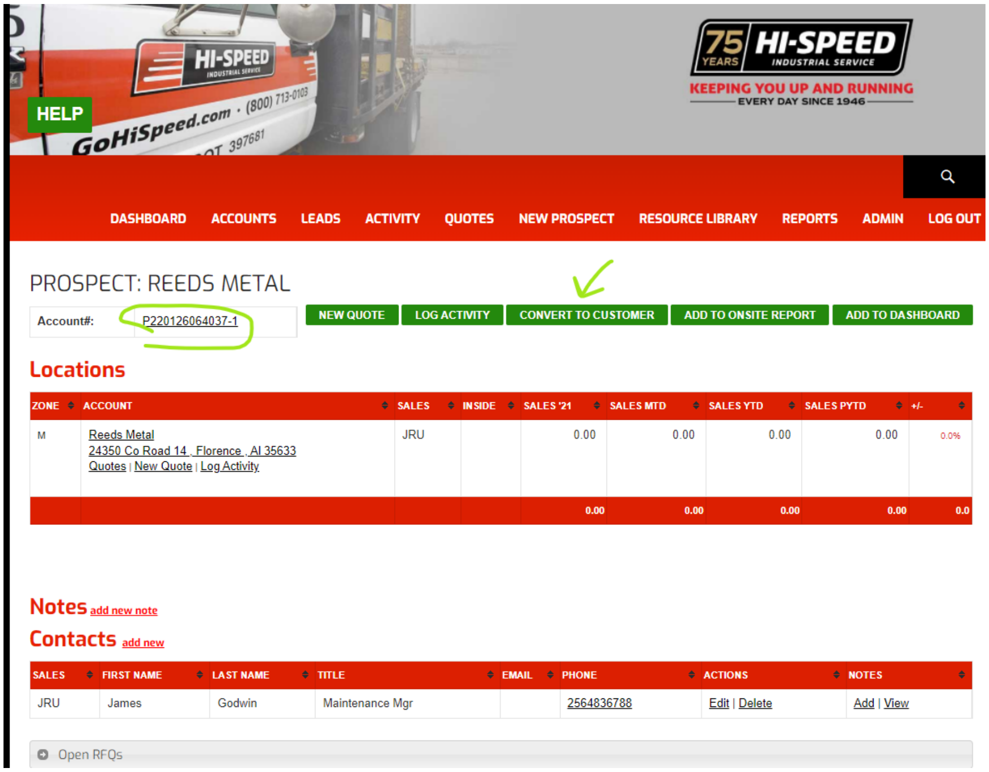
## Things to remember

Once a prospect has been setup in ACS, the process of ACS pushing the data to the CRM must occur. This process should occur every 2 hours. You can view when the latest update occurred by browsing the Reports->Daily Batch Log Summary File and look at the Customer No Sales (LR) or Web Sales Customer (LR) jobs to see if they have run since updating ACS.

## Process to Merge Prospect

1. Find and Click on the Prospect name you would like to merge to get to the account detail page.

2. From the account detail page, click on the button "Convert to Customer"




3. Begin typing the customer name you would like to merge the prospect with in the search box. An autocomplete selection should appear matching your criteria. If you don't see the matching customer name, but you know the customer number and ship-to you can enter that directly in the boxes below. Once ready to finalize just click save.