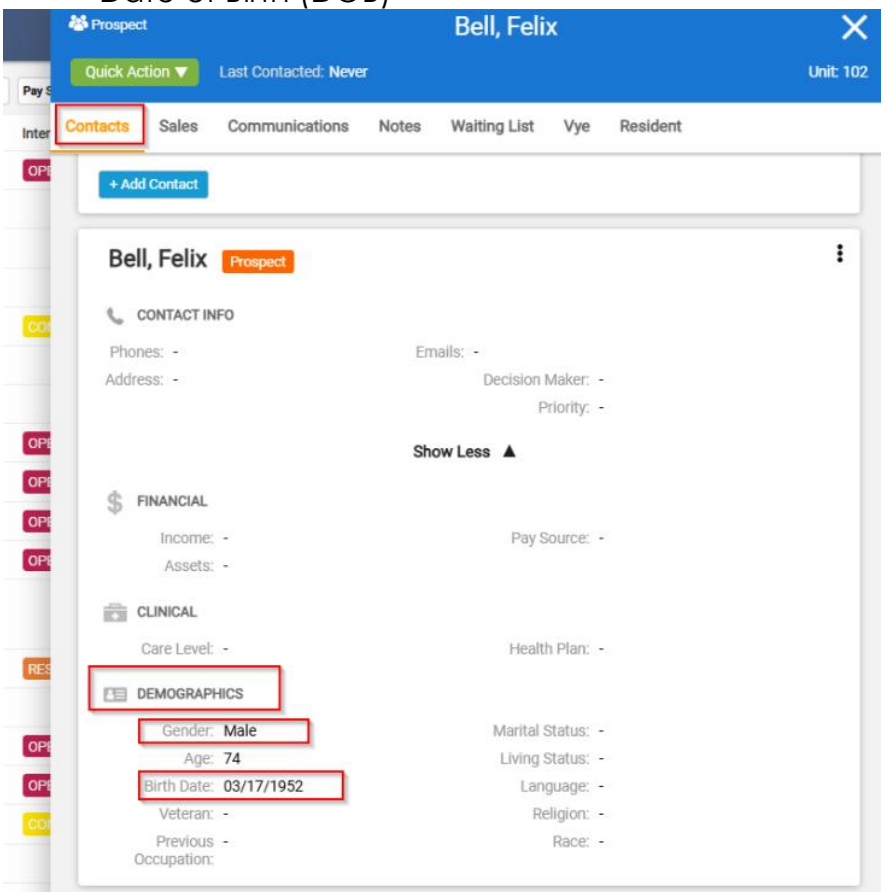
Sales CRM + NEXT Clinical Information Sync

When using **Sales CRM** with **NEXT Clinical**, there are a few important items to be aware of to ensure information flows correctly between the systems.
New contract signed

Prospect Demographics

Before a prospect can be successfully transferred, the following demographic information **must** be entered on the **Contacts** tab of the prospect record:

- Gender
- Date of Birth (DOB)



This information is required because it is transferred from **Sales CRM** to **Legacy**, and then from **Legacy** to **NEXT Clinical**.

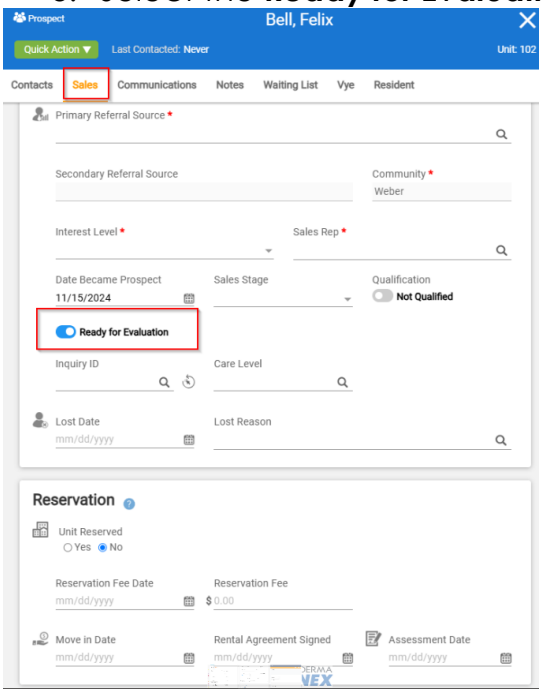
Creating a Prospect Evaluation in NEXT Clinical

If you need to create a prospect evaluation in **NEXT Clinical**, this can be initiated directly from **Sales CRM**.

Sales CRM + NEXT Clinical Information Sync

To do this:

1. Open the prospect record.
2. Navigate to the **Sales** tab.
3. Select the **Ready for Evaluation** option.



Once this option is selected, the prospect information will be pushed to the **Prospects** section in **NEXT Clinical**, where the evaluation can be completed.

