Practifi Client Lifecycle


```
Global Actions Menu
        │
        ▼
Create Individual ──────► Discovery qualified? ──Yes──► Promote to Prospect ──────► Client won? ──Yes──► Promote to Client
        │                        │                              │                        │                      │
        ▼                       No                              ▼                        No                     ▼
Individual record page          ▼                      Enter Service Details             ▼              Select the Deal to close
opens [1]               Mark as Lost Prospect                   │               Mark as Lost Client              │
                                                                ▼                                                ▼
                                                     Definition changes to                           Definition changes to Client
                                                     Prospect                                                    │
                                                                │                                                ▼
                                                                ▼                                       Deal Stage changes to Closed Won
                                                     Pipeline and Processes/Tasks                                │
                                                     appear in record side panel [2]                             ▼
                                                                │                                       Deal is converted to Service
                                                                ▼                                                │
                                                     Creates Deal Record related                                ▼
                                                     to a Service Type                             Additional sections in record side panel [3]
```

Legend:
- Manual Task
- Pre-configured workflow automation
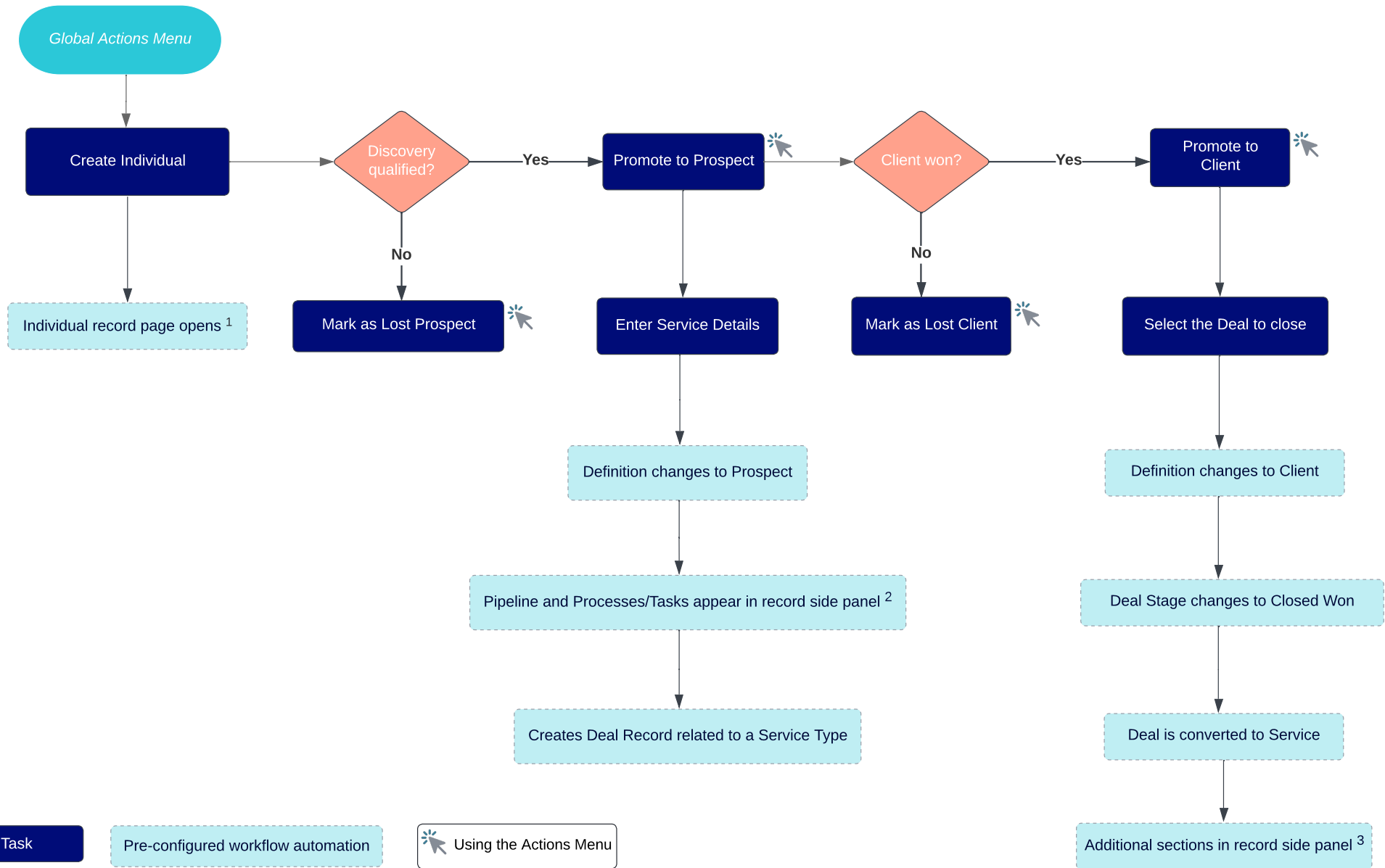- Using the Actions Menu

1 Record side panel navigation icons: Overview, Relationships, Reference Docs, Feed and Activity.

2 Navigation icons in 1 plus: Financials, Income and Expenses, Processes and Tasks and Pipeline.

3 Navigation icons in 2 plus: Pipeline changes to Services and Pipeline.

Definitions — Definitions are used to classify records. This impacts where you find them in the system and what you see when opening the record page.

Definition Types — Prospect, Lost Prospect, Client, Lost Client