Prospects Overview and Topics

The Sales Management module provides tools for tracking sales leads and the dollars values that have been quoted by using Prospects and Opportunities.

The Prospect is the person or business to whom a Salesperson trying to sell a system or services. A Prospect record is used to record basic information about the Prospect and contains other sub-forms available for tracking sales related information. These sub-forms are Qualifications, Contacts, Notes and Opportunities.

The Prospect form and each of the sub-forms are defined within the topic links listed below.

Prospect Queue

Prospect Form Definitions

Creating a New Prospect

Qualifications Form Definitions

Contacts Form Definitions

Note Log Form Definitions

Documents Form Definitions

How to Send a Prospect Record to QuoteWerks