Prospect Queue

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The Prospects Queue is a listing of all Prospects in process. As Prospects are sold or lost and inactivated, they drop off the list. Once a Prospect has been inactivated, it still remains in the database. Inactive Prospects may be viewed from the Prospects List by selecting the Show Inactive option.

The Prospects Queue contains columns of information in a grid with basic information related to each Prospect record, has selectable filters located at the top of the form, and contains function buttons at the top of the form.

The Filters are used to display a list of Prospects that meet the filter criteria selected. For example if only the Prospects created with a particular lead Source are to be viewed, you will make a selection from the Sources filter. Only the Prospects with the lead Source selected will be displayed in the grid area.

A the lower right of the Prospects Queue is a count of how many Prospects are contained in the list currently being viewed.
Each column within the Prospect List, the Filter options and Function buttons will be described below.

Prospects Queue Filters

Four filter fields are located at the top of the Prospect Queue. The Filters are used to display a list of Prospects that meet the filter criteria selected. Each filter available is listed and described below. When using one or multiple Filters, you make select one choice in the drop-down list for each filter or select the All option.

- **Status** - A Status is a required field on each Prospect record. The Status is designed to describe where the Prospect is in the Sales Cycle. You may filter the Prospect list by selecting a single Status code from the drop-down list. The default is All Statuses. Your company creates the list of Statuses available for selection. Status codes are created and maintained in SedonaSetup.
- **Source [Lead]** - There are two Source fields on each Prospect record; Primary and Secondary. The Source is designed to describe how the Prospect heard about your company. You may filter the Prospect list by selecting a single Source code from the drop-down list. The default is All Sources. When using this Filter option, the software is only looking in the Primary Source field for Prospects that meet your selection criteria. Your company creates the list of Sources available for selection. Source codes are created and maintained in SedonaSetup.
- **Sales Department** - Each Salesperson is assigned to one or multiple Sales Departments. When a new Prospect is created this is a required field. Your company may have one or multiple Sales Departments. You may filter the Prospect list by selecting a single Sales Department from the drop-down list. The default is All Sales Departments. Your company creates the list of Sales Departments available for selection. Sales Department codes are created and maintained in SedonaSetup.
- **Salespeople** - Each Prospect is assigned to a Primary Salesperson and an optional 2nd Salesperson. This filter only works with the Primary Salesperson assigned to the Prospect. You may filter the Prospect list by selecting a single Salesperson from the drop-down list. The default is All Salespeople. If the Sales Management setup limits

the User to see only their own Prospect records, this filter is not used.

Prospects Queue Grid

The grid section of the Prospects Queue contains several columns of information. You may re-sort the list by clicking on any of the column headers. Each column in the grid is described below.

- Name - The name entered on the Prospect record is displayed in this column.
- Company - This column is only displayed if the option at the lower left of the Prospect List, Show Company Name, is selected. If the Prospect was flagged as Commercial Type, the name of the Company entered on the Prospect record will display in this column. This column will be blank for Residential Type Prospects.
- Address 1 - This column displays the information entered into the Address Line 1 field of the Prospect record.
- Phone 1 - This column displays the information entered into the Phone 1 field of the Prospect record.
- Department - This column displays the Sales Department that was selected on the Prospect record.
- Salesperson - This column displays the name of the Primary Salesperson entered on the Prospect record.
- # Days - This column displays the number of Days Old of the Prospect record. The counter begins from the date the Prospect record was created. If an older Prospect record is reactivated, the counter continues from the date the Prospect was originally created; this cannot be modified.
- Follow Up [Date] - This column displays the current Follow Up date entered on the Prospect record. If the Follow Up date is prior to today's date, the Prospect row will be displayed in a blue font. If the Follow Up date is a date in the past, the row will be displayed in a red font.
- Days to Follow Up - If a date is currently displayed in the Follow Up date field, this field will calculate and display the number of days until the Follow Up date. If the number is shown as a negative value, this indicates the Follow Up date is prior to today.
- Status - This column displays the current Status of the Prospect record.
- Temperature - This column displays the Temperature field selection on the Prospect record.
- Source - There are two Source fields on each Prospect record; Primary and Secondary. In this column, the software displays the selection made in the Primary Source field of the Prospect record.

Prospect Queue Function Buttons

At the upper left of the Prospect Queue are several function buttons. Each button is described below.

Prospects - Clicking this button will display a list of all active Prospects. If any filters were selected, the Prospects displayed in the grid will be those that meet the filter criteria.

Contacts - Clicking this button will display a list of all active Contacts. If any filters were selected, only the Contacts linked to the Prospects that meet the filter criteria will be displayed.

Re-flags - Clicking this button will display a list of all Prospects marked for Re-Flag. If any filters were selected, only the Prospects that meet the filter criteria will be displayed.

Email Sales Reps - This button is used to send an email to the primary salesperson saved to the Prospect record. You may send an email regarding every Prospect in the Prospect List or just selected Prospects. For each Prospect record selected in the grid, the Salesperson will receive a separate email.

To send an email to all Prospects in the list, highlight the first row, hold down the Shift key on your keyboard then highlight the last row; all rows will become highlighted. Next click the Email button; the email summary form will be display to enter a subject line and a Summary text box to enter your message to the Salesperson. The same Subject Line and Summary text will be used for each email sent to the Salesperson.

To send an email to selected Prospects in the list, highlight the first Prospect row for which you want to send an email, then hold down the CTRL key on your keyboard while clicking on additional Prospect rows within the grid area. When finished click the email button.

QuoteWerks - This will only be displayed if the QuoteWerks application is installed on the workstation, and your company has purchased the QuoteWerks integration. Clicking this button will launch the QuoteWerks application.