

Prospect Qualifications

Last Modified on 01/11/2023 3:15 pm EST

The Qualifications form is displayed on the Prospect toolbar once the Prospect form has been saved. All data entry fields contained on the Qualifications form are User Defined. This means that your company determines which fields to be used and what description label for each field will be displayed on the form.

This form is used to gather additional information related to the Prospect that will assist the Salesperson when making the initial telephone call to the Prospect. The field labels are assigned in SedonaSetup. The use of this form is optional but highly recommended.

If using this form, make certain to click the Apply button at the lower right to save the information to the Prospect record.

Below are examples of how to use some of the fields on the Qualifications form.

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