Create a New Prospect

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To create a new Prospect follow the instructions listed below.

1. Navigate to the Sales Management/Prospect menu option from the Main Application menu.

2. The list of Prospects will be displayed. Click the New button located at the lower right of the Prospects List.

3. The New Prospect form will be displayed. Populate the fields on the form according to your company's policies and procedures. Once all data entry has been completed, click the Apply button to save. Each data entry field is described below.

Prospect Data Entry Fields

- Residential or Commercial - Select the appropriate radio button that applies to the Prospect. If the Commercial option is selected a field will be displayed to enter the name of the Company. This is a required field.
- Company - If the Commercial radio button was selected, enter the name of the Company.
- Name - For Residential type Prospects, enter the Last Name, First Name. If the Commercial type radio button was selected, enter the primary contact name for the company.
- Address - Press the address button to enter the address of the Prospect. After entering the street address information, tab to the Zip Code field. Enter the Zip Code then press the tab key. The City and State will automatically fill in.
- Status - Select the Prospect Status from the drop-down list. This describes where the Prospect is in the Sales cycle. This field is manually updated by a User as the Prospect moves through the sales cycle.
- Pri. Source - Select the Primary Lead Source from the drop-down list. This describes how the Prospect heard about your company.
- Sec. Source - If you have two Lead Sources for the Prospect, make a selection from the drop-down list. The choices on the drop-down list are the same as the Primary Lead Source.
- Re-Flag - Selecting this option will open two additional fields on the Prospect form; As Of and Re-Flag Status. Marking a Prospect as a Re-flag will remove the Prospect from the Prospect Queue. The Prospect will automatically return to the Prospect Queue on the date specified in the As Of field and the Prospect Status will be set to the Re-Flag Status selected. When a Prospect is set for Re-Flag, it is moved into a separate Re-Flag Prospect Queue.

  This option is typically used if the Prospect is interested in a quote from your company but will not be ready for several weeks or months in the future.

- Resolution - This field is not typically selected when creating a new Prospect. Once a sale has closed or has been lost, the user will make a selection in this field as one of the procedural steps of closing out a Prospect.

- Master Account - If the Prospect being created will be a Subaccount which will eventually link to an existing Master Account, make a selection from the drop-down list. Otherwise, skip this field.
- Temperature - This field has three available choices that are controlled by the application; no new entries may be made to the selection list at this time. The drop-down list choices are Cold, Warm and Hot. The intended use of this field is for the Salesperson's interpretation of the Prospect's likelihood of closing the sale.
- Phone 1 - The primary telephone number for the Prospect.
- Phone 2 - The secondary telephone number for the Prospect.
- Mobile - The mobile telephone number for the Prospect.
- Pager - The pager telephone number for the Prospect.
- Fax - The fax telephone number for the Prospect.
- Email - The email address for the Prospect. Entering an email address will make available other functions for the Prospect such as sending an email, creating a Vcard or scheduling an appointment through Microsoft Outlook.
- Sales Department - Select the Sales Department to which the Prospect is being assigned.
- Salesperson - Select the Salesperson being assigned to the Prospect from the drop-down list.
- 2nd Salesperson - If a second salesperson is also working on the Prospect, a second Salesperson may be selected from the drop-down list.
- Next Follow Up - Enter a date indicating the next time the Prospect needs to be contacted.
- Resolution Date - This field is used to enter the date on which the Prospect was Resolved. This field is not populated until closing out the Prospect at a later time; skip this field for a new Prospect.
- Comments - This is a free-form text field to enter important information related to the Prospect. This field has a 256 character limit.
- Inactive - This option is used to inactivate a Prospect. Once a Prospect has been inactivated, it will disappear from the Prospect Queue. A Prospect may be reactivated at a later time if necessary.
- Retain Data After Apply - This option is typically used if you are entering several Prospects for the same Salesperson. If this option is checked when saving a Prospect, when you begin a new Prospect record, several data entry fields will automatically fill-in with information from the previously saved Prospect. Using this option shortens the data entry time if most of the fields should remain the same. These auto-fill fields are: Status, Primary Source, Temperature, Sales Department, and Salesperson.

4. Once the Prospect form has been saved, the Prospect toolbar on the left will be populated with other function buttons for entering additional information related to the Prospect. At the bottom of the Prospect record are five function buttons. Click on the link below for definitions.

Follow the links below for instructions on each toolbar function button and each Prospect record function button.

Prospect Qualifications

Prospect Contacts

Prospect Opportunities

Prospect Note Log

Prospect Documents

Prospect Function Buttons