

Prospect Function Buttons

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There are five function buttons located at the lower left of the Prospect form; these buttons have links to Microsoft Outlook and MS Word functionality. To be able to use any of these functions, the workstation must have Microsoft Outlook and MS Word installed.

- Email Button - This option button is only available if an email address was entered on the Prospect form. Clicking this button will open the Prospect Email form. You will enter information into the Subject line and the Summary text box. Selecting the option Add Summary to Email will add the typed information into the Outlook email to be sent to the Prospect. Any information entered into the Summary text box will automatically be saved to the Prospect Notes. After filling out this form, click the Send button located at the lower right of the form; this will open a new Outlook Message form. You may add additional information into the email, then send to the Prospect.

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- Mail Merge Button - Clicking this button will open the Windows File Explorer to locate a previously saved Mail Merge Template letter. Once a template letter is selected, it will fill in with information from the Prospect record, and then the letter may be printed. This option is typically used to send a "Thank you for your interest" letter to the Prospect.

- vCalendar Button - If this button is clicked, MSOutlook will open to the new Appointment form. The appointment subject will fill in with the name of the Prospect, and any information typed into the Prospect Comments field will fill into the body of the appointment form. You may schedule the appointment and save.

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- Create vCard Button - Selecting the option button will open a new Outlook Contact form. Information entered into the Prospect form will automatically fill into many of the fields on the Outlook Contact form. Any information typed into the Prospect Comments field will fill into the Outlook Contact Notes field.

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- Import Button - This function button is only available when creating a new Prospect. This option is used to import information from an Outlook Contact into the Prospect form. Clicking this button will open the Outlook Contacts form. Select a name from the contact list then click the Save button. Many of the fields from Outlook Contact information will automatically fill into the Prospect form.

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