Managing Your Prospective Leads

Class Syllabus

Topics Covered:

I. Adding a New Prospect into Prospect Manager
   A. Filling out the General Details
   B. Adding a Customer Who is Not a Company
   C. Adding a Contact Person
   D. Adding Quickpick Items
   E. Displaying User Defined Fields
   F. Adding New Booking Defaults to Prospect Manager
   G. Adding Required Fields to Prospect Manager
   H. Making Fields Conditionally Required
II. Additional Prospect Information Tabs
   A. Using the Mapping Interface
   B. Copying/Pasting Directions
   C. Copying Prospect Notes from the Scratch Pad
   E. Inserting an Image
III. Assigning Next Actions, Action Dates, and Status
   A. Adding Next Actions and Next Action Dates
   B. Changing the Prospect Status
   C. Saving and Retrieving Filters
IV. Managing Reminders in Prospect Manager
   A. Adding a New Reminder
   B. Adding a Contact History Note
V. Creating a Prospect Proposal
   A. Filling out the Proposals Tab
   B. Filling out the Details Tab
   C. Printing a Prospect Proposal
   D. Modifying a Proposal Print
   E. Copying a Proposal
   F. Creating an Event from a Proposal
VI. Storing Off-Premise Event Information
   A. Setting a Default Site Location
VII. Changing the Account Status
   A. Changing from a Prospective Account to an Active Account
   B. Changing from an Active Account to a Prospective Account
VIII. Importing a List of Prospects
IX. Searching for Prospects
   A. Searching Incrementally
   B. Using the Prospect Finder Tool
X. Querying Your Prospective Customers
   A. Running a Custom Query of Your Prospects
   B. Printing a Detail Grid
XI. Q & A