Managing Your Prospective Leads in Prospect Manager

Class Syllabus

Topics Covered:

I. Adding a New Prospect in Prospect Manager
  A. Adding Contact People to a Prospective Account
    1. Adding a Contact Person Who is Not a Company
  B. Adding Quickpick Items to the Status, Next Action, and Proposal Status
  C. Creating User Defined Fields in Prospect Manager
    1. Creating a User-Defined Field
    2. Displaying User-Defined Fields
  D. Establishing New Booking Defaults for Prospect Manager
  E. Establishing Required Fields to Prospect Manager
    1. Making Required Fields Generally Required
    2. Making Required Fields Conditionally Required

II. Completing Additional Prospect Information Tabs
  A. Using the Mapping Interface
    1. Copying the Directions and Pasting into the Directions Tab
  B. Using the Prospect Manager Notes Tab
    1. Copying Prospect Notes from the Scratch Pad
  C. Using the Prospect Manager Picture Tab
    1. Inserting an Image

III. Creating Next Actions and Next-Action Dates
  A. Adding Next Actions and Next-Action Dates
  B. Setting a Prospect Status
  C. Working with Prospect Manager Filters
    1. Establishing a Filter
    2. Saving a Filter
    3. Retrieving a Previously Saved Filter

IV. Creating Reminders and Contact History Notes in Prospect Manager
  A. Creating a New Reminder
    1. Using the Active Reminders Tool
    2. Retrieving Linked Reminders into a Manager
    3. Dismissing or Snoozing Reminders
  B. Creating Contact History Items in Prospect Manager
    1. Creating a New Contact History Note
    2. Viewing and Editing Contact History Notes in Prospect Manager
    3. Customizing Columns in the Contact History Grid
    4. Showing the History Comment in the Contact History Grid

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. Sending E-mails from Prospect Manager
    F. Copying a Proposal
    G. Creating an Event from a Proposal
    H. Adding Events from Prospect Manager

VI. Storing Off-Premise Event Information

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
    C. Assigning a Master Account to a Prospect
        1. Displaying the Master Account Field
        2. Viewing Clients by Master Account
        3. Viewing Events or Contact People for All Clients of a Master Account

VIII. Importing a List of Prospects
    A. Step 1: Selecting Import Files and Options
    B. Step 2: Matching Prospect Manager Fields
    C. Step 3: Confirming Primary Import Data

IX. Searching for Prospects
    A. Searching Incrementally by Prospect Name
    B. Sorting and Searching Incrementally by Other Details
    C. Fields Available in Prospect Manager
    D. Using the Prospect Finder Tool

X. Querying Your Prospective Customers
    A. Running a Custom Query of Your Prospects
    B. Sending Batch E-mails from Prospect Manager
    C. Printing a Query Grid
    D. Tracking Proposal Activity

XI. Q & A