

web training syllabus

Managing Your Prospective Leads

Topics covered:

- I. Adding a New Prospect by hand
 - A. Filling out the General Details
 - B. Misc. information (trackable/ Quickpick fields)
 - C. User Defined prospect fields
 - D. The Prospects Notes Tab
 - E. The Prospects Directions Tab
 - F. The Prospects Picture Tab
- II. Adding Contact People
 - A. Copy to Client feature
- III. Creating Next Actions, Action Dates and Status
 - A. Adding a Next Action
 - B. Adding an Action Date with the Dynamic Date Selector
 - C. Changing the Prospect Status
 - D. Adding Quickpick Items to the Status and Next Action fields
 - E. Displaying the Prospect Status Color
- IV. Managing Reminders in Prospect Manager
 - A. Adding a new reminder
 - B. Viewing and editing reminders
 - C. Making a reminder inactive
- V. Storing Contact History Notes
 - A. Adding a contact history note
 - B. Viewing and editing contact history items
- VI. Creating a Default Site Location for a Prospect
- VII. Printing Letters & Envelopes from Prospect Manager
- VIII. Sending Emails from Prospect Manager
- IX. Changing the Account Status
 - A. Displaying Grid Colors
 - B. Designating Color Codes for Active Accounts and Prospects
 - C. Changing prospects to active accounts
 - D. Changing accounts to prospects
- X. Adding Events from Prospect Manager
 - A. Adding a new event
 - B. Viewing and editing events
 - C. Using the Event Wizard to add a new event
- XI. Importing a list of Prospects
- XII. Prospect Manager Grid functions
 - A. Using the Quick Column Customizer
 - B. Setting and saving custom filters
 - C. Setting and saving custom views
 - D. Exporting Grid Data
- XIII. Sending Batch Emails from Prospect Manager
- XIV. The Prospect Query
 - A. Adding query conditions
 - B. Saving custom Prospect queries
 - C. Printing a detail grid
 - D. Viewing grid results in a chart
 - E. Printing a chart view
- XV. Q & A

Important Notes:

- High-speed web access is required.
- Payment in full must be made prior to the class.
- Caterease is not responsible for loss of connection, either by the student or by the moderator. If a student cannot attend a class due to technical problems, he or she will be allowed to attend at a later date. If a moderator is forced to cancel a class due to technical problems, that class will be rescheduled. No monies will be refunded.

