

# Prospect Management

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## Prospect Entry and Management

Enter prospects into the Front Desk system and keep track of their interests. Use this system to enter the prospects after first initial contact and to keep track of the recruiting progress. Set up marketing campaigns with mail or email promotions and letters to your prospects with ease. Click on the “**Front Desk**” Menu to open the Prospect Appointment Management program. Use this program to set appointments and manage marketing campaigns for prospects.

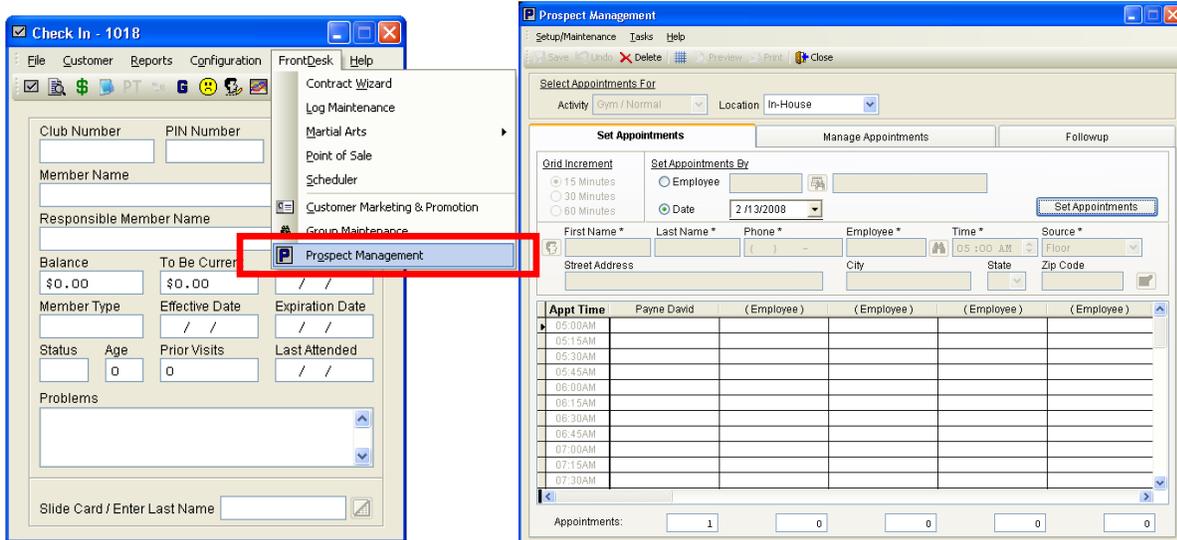


Figure 29-1.

In this tutorial we will address how to set up the prospect management system first, then cover how to use the prospect management system.

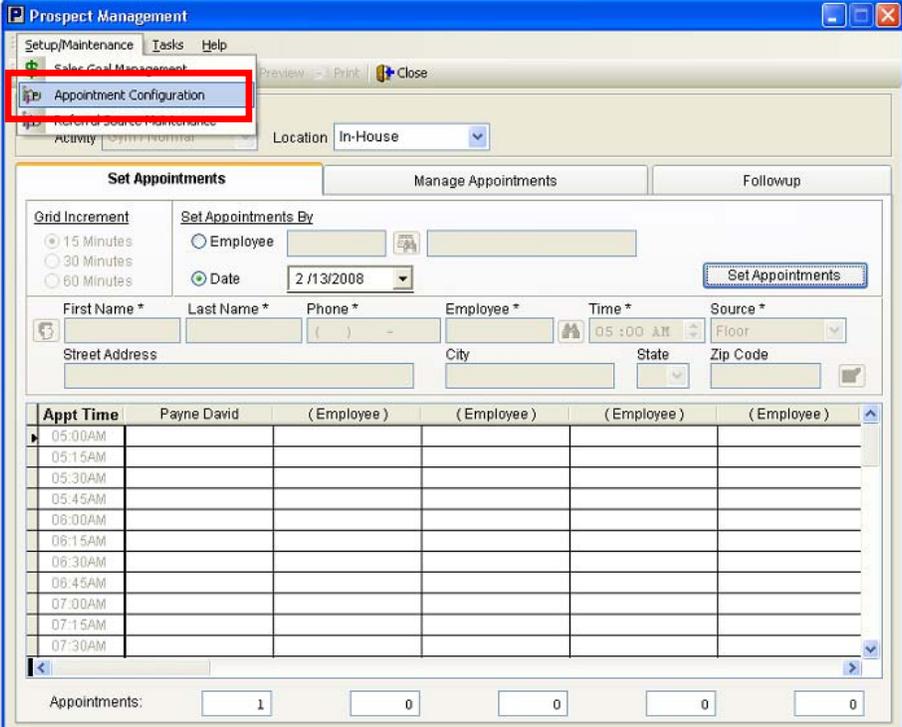
### Setup/Maintenance Menu

Use this Menu to set up and maintain all Prospect Management and Marketing options.



## Appointment Configuration

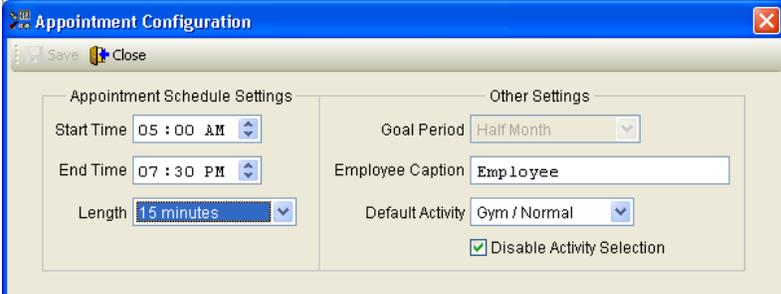
This configuration screen will determine the viewing parameters of the Set Appointments tab. Set the start and end time of the appointment schedule. Set the length of time for each appointment and the type of activity they are being scheduled for. A default employee caption, such as "Trainer" or "Salesperson" can be configured to appear within the appointments grid. The default is "Employee" After these options have been set, click on the "Save" button. 



The screenshot shows the 'Appointment Configuration' window within the 'Prospect Management' application. The 'Appointment Configuration' tab is highlighted. The 'Set Appointments' section is active, showing a grid for scheduling appointments. The grid has columns for 'Appt Time', 'Payne David', and four '(Employee)' entries. The 'Set Appointments By' section is set to 'Date' for '2/13/2008'. The 'Set Appointments' button is visible.

Appt Time	Payne David	(Employee)	(Employee)	(Employee)	(Employee)
05:00AM					
05:15AM					
05:30AM					
05:45AM					
06:00AM					
06:15AM					
06:30AM					
06:45AM					
07:00AM					
07:15AM					
07:30AM					

Figure 29-2.



The screenshot shows the 'Appointment Configuration' dialog box. The 'Appointment Schedule Settings' section includes fields for Start Time (05:00 AM), End Time (07:30 PM), and Length (15 minutes). The 'Other Settings' section includes fields for Goal Period (Half Month), Employee Caption (Employee), Default Activity (Gym / Normal), and a checked checkbox for 'Disable Activity Selection'.

Figure 29-3.



## Referral Source Maintenance

This window is where all the different types of initial club referrals are set up. It is accessed by clicking the highlighted area below:

The screenshot shows the 'Prospect Management' application window. The 'Referral Source Maintenance' option is highlighted in red in the left-hand menu. The main window displays the 'Set Appointments' section, which includes a 'Grid Increment' section with radio buttons for 15, 30, and 60 minutes. Below this is a 'Set Appointments By' section with radio buttons for 'Employee' and 'Date', and a date field set to '2/14/2008'. The main form contains fields for 'First Name', 'Last Name', 'Phone', 'Employee', 'Time', and 'Source'. Below these are fields for 'Street Address', 'City', 'State', and 'Zip Code'. At the bottom, there is a table with columns for 'Appt Time' and five '(Employee)' columns. The table rows show times from 05:00AM to 07:30AM in 15-minute increments. At the very bottom, there are five input boxes for 'Appointments:' with the value '0' in each.

Figure 29-4.

The following window will appear:

The screenshot shows a dialog box titled 'Referral Source Maintenance'. It has a menu bar with 'New', 'Edit', 'Save', 'Undo', 'Delete', and 'Close'. Below the menu bar, there is a label 'Choose the Referral Source to Retrieve' and a dropdown menu with 'Front' selected. To the right of the dropdown is a 'Type' dropdown menu.

Figure 29-5.

There are four default referral sources listed (Front, Floor, Phone, Referral). You may also choose to add a source such as a newspaper or magazine ad. You will also select a type for the referral source. The two choices are "appointment source" and "referral source". You may add a source by clicking **"New"**, edit an existing source by clicking **"Edit"** or simply delete a source by clicking **"delete"**. Once the referral source setup is complete, click **"Close"** to exit.



## Sales Goal Maintenance

This is used for setting up parameters used in the Prospect Management Goal Attainment report. It is accessed by clicking the highlighted area below:

The screenshot shows the 'Prospect Management' application window. The 'Sales Goal Management' menu item is highlighted with a red box. The main window displays the 'Set Appointments' section, which includes a 'Grid Increment' section with radio buttons for 15, 30, and 60 minutes. Below this is a 'Set Appointments By' section with radio buttons for 'Employee' and 'Date', and a date field set to '2/14/2008'. There are also fields for 'First Name', 'Last Name', 'Phone', 'Employee', 'Time', and 'Source'. A table below these fields shows appointment times from 05:00AM to 07:30AM in 15-minute increments, with columns for '(Employee)'. At the bottom, there are five input fields for 'Appointments:' with the value '0' in each.

Figure 29-6.

The following window appears:

The screenshot shows the 'Sales Goal Maintenance' window. It has a title bar with 'Sales Goal Maintenance' and standard window controls. Below the title bar are 'Save', 'Undo', and 'Close' buttons. The main area contains a 'Branch' dropdown menu set to 'In-House' and a 'Group' dropdown menu set to 'Group 1'. Below these are three rows of input fields: 'Invoice Goal' with the value '\$1,000', 'Gross Goal' with the value '10' and the text '% of Invoice Goal = \$100', and 'Eff Goal' with the value '15' and the text '% of Invoice Goal = \$150'.

Figure 29-7.

Type the desired Sales Goal parameters in the maintenance window. Click "Save" to save new entries and changes. Click "Undo" to erase any changes made. Click "Close" when you are finished.

The remainder of the setup is located in the Customer Manager window of the software. You may access it by going to the Check-In module then clicking Customer / Customer Manager as illustrated below:

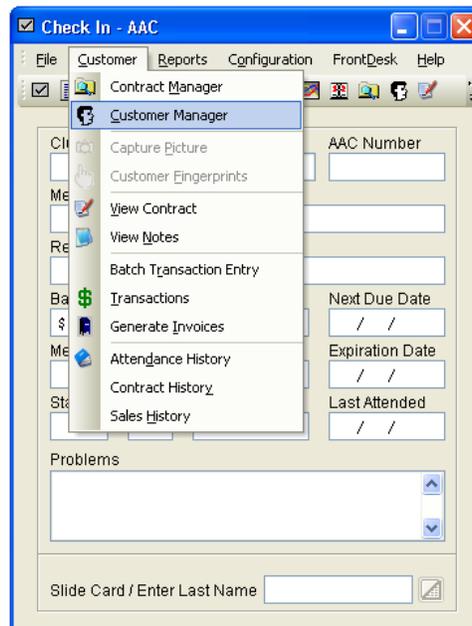


Figure 29-8.

Once clicked, the Customer Manager window appears. Click **"Prospect"** from the menu bar at the top of the window and you will see more links to Prospect Management setup areas, as illustrated below:

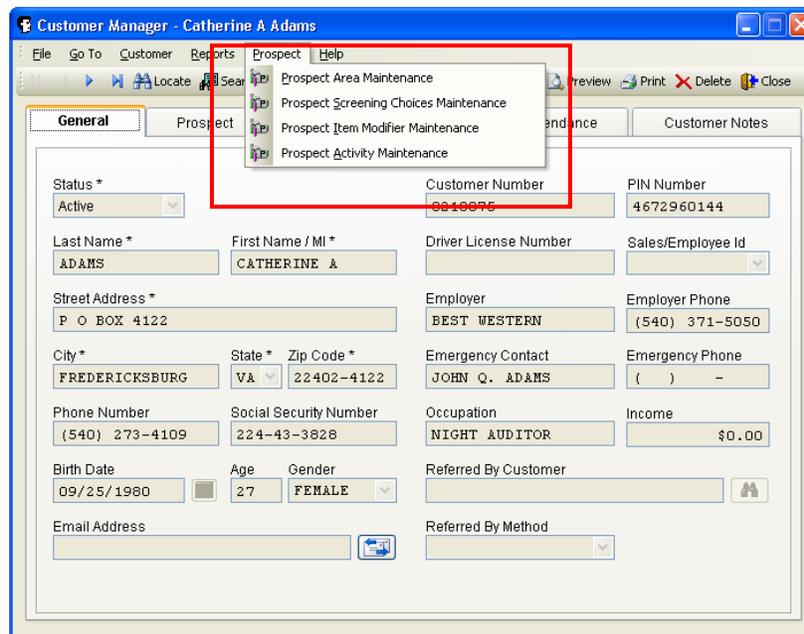


Figure 29-9.

Once here, you may continue the Prospect Management setup by configuring the following four setup areas:



## Prospect Area Maintenance

The Prospecting Area Maintenance area views follow:

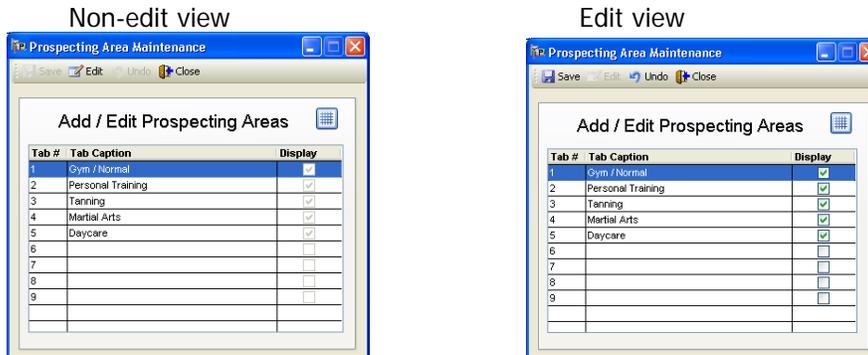


Figure 29-10.

The Prospecting Area Maintenance window lists the different services offered by your business. Once the window is open, Click on **“Edit”** to create or change prospecting areas. Just highlight an area in the Tab Caption column to create a new or change an existing prospecting area. Placing a check in the box located in the **“Display”** column makes it visible as a tab in the Customer Manager/Prospect Tab, as shown below:

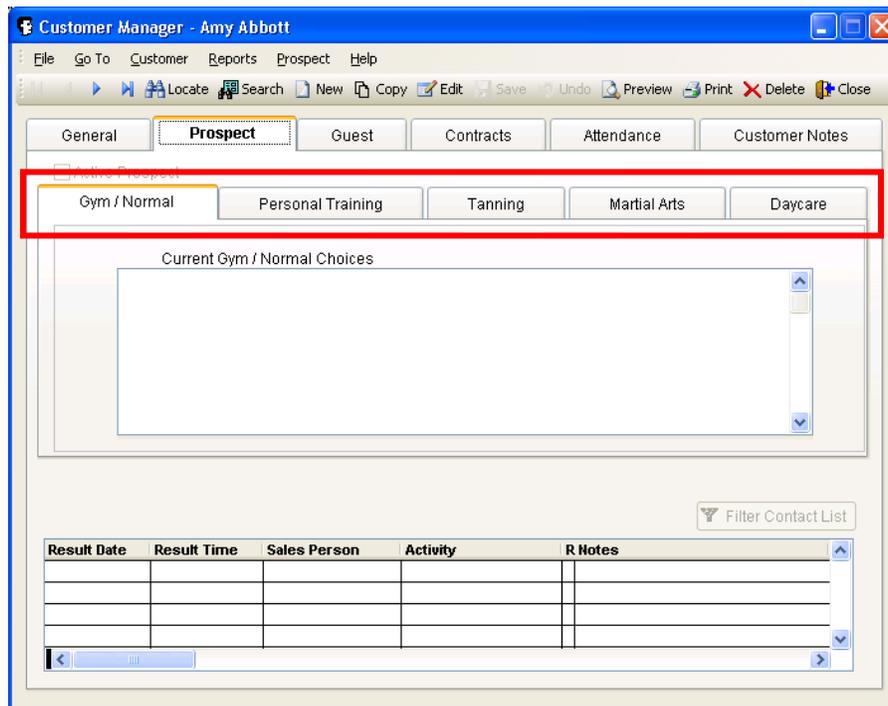


Figure 29-11.

Once finished with the Prospecting Area Maintenance window. Click **“Close”** to exit the window.



## Prospect Screening Choices Maintenance

The Prospect Screening Choices Maintenance window is the area to set up different pieces of information to collect about your client, such reasons why the prospect is seeking the services you offer. With this information you are aware of what that prospect wants and can concentrate on those areas when planning a tour for the prospect. This area is also used for listing important information such as a prospect's medical condition, or even obstacles the prospect feels is keeping them from signing a membership contract. A tour or presentation can be tailored to with this information in mind.

The Screening Choices Maintenance window appears as follows:

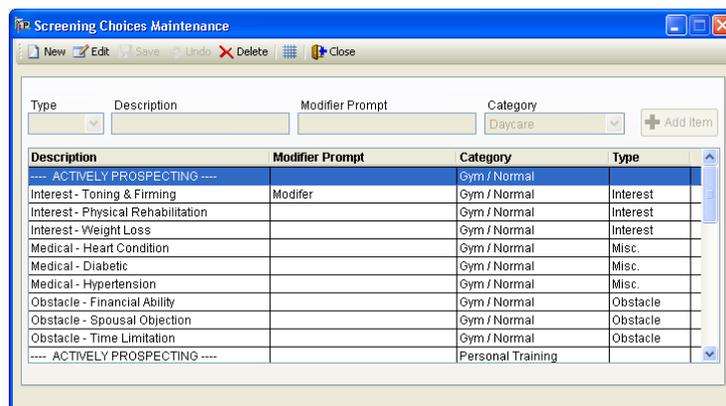


Figure 29-12.

To create a new screening choice click **"New"**. The window will then appear thusly:

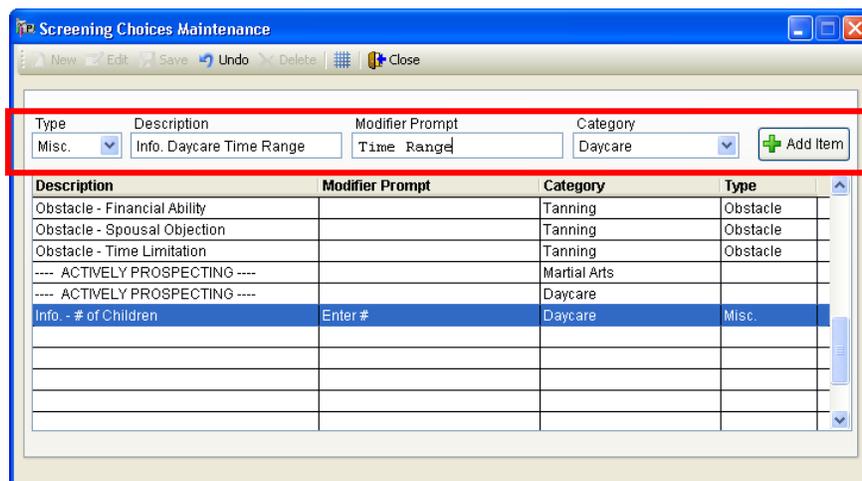


Figure 29-13.

Four pieces of information will be entered to set up the screening choices. They are as follows:

- 1) Type – Choose either Interest, Obstacle or Misc.
- 2) Description – Your description of the screening choice.
- 3) Modifier Prompt – This is an optional entry of information concerning this screening choice. Enter a description of the information entered related to that screening choice. Once set, this will appear as an automatic prompt when a screening choice is associated with a prospect.



- 4) Category – Choose a prospecting area to associate with this screening choice.

An example is shown on the highlighted area above. It is screening choice that concerns when daycare would be needed for a prospect. This information can help determine which daycare worker should give a presentation or tour to the prospect.

Once the information is entered click on the **“Add Item”** icon to enter the information. The window will then look like this:

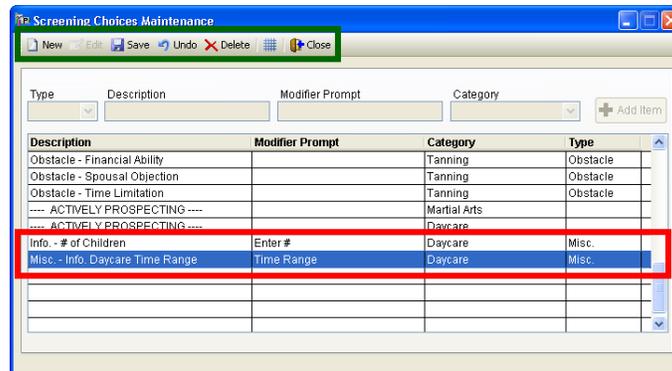


Figure 29-14.

The red highlighted area shows how the new screening choice appears after it has been entered.

The green highlighted area shows the other functions of the Screening Choice Maintenance window. They are as follows:

- 1) Save – Saves newly entered items or changes made to existing items.
- 2) Edit – Opens existing items to make changes.
- 3) Undo – Erases new items or negated changes made to existing items.
- 4) Grid Viewer (☐) – Offers the option of viewing or not viewing the gridlines in the viewer.
- 5) Close – Exits the window.

## Prospect Item Modifier Maintenance

When adding a screening choice with a modifier prompt to a prospective customer the software is set to enter the modifier by default. There is an option to enter preset modifier value via the Prospect Item Modifier Maintenance window. Here is a view of this window:

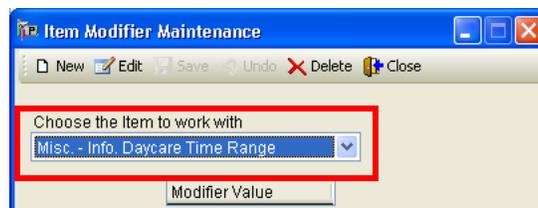


Figure 29-15.



Once the window is opened, select the modifier prompt to work with in the dropdown box labeled “Choose the item to work with”, as shown highlighted above. If there are no values entered for this prompt, this message will appear:



Figure 29-16.

Click **“OK”**. You will be taken back to the Item Modifier Maintenance window with the modifier prompt item you selected and can continue from there.

Click the **“New”** icon at the upper left of the window. The view will change to this:

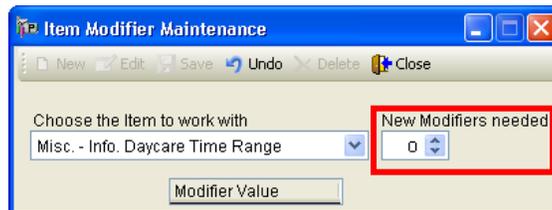


Figure 29-17.

Please note the addition of a dropdown box labeled “New Modifiers needed” as highlighted above. Use the arrows to select the number of modifier choices desired. If two new modifiers are needed, then two text boxes appear below the “Modifier Value” area at the bottom of the window, as illustrated below:

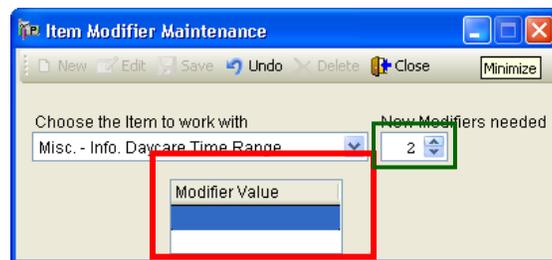


Figure 29-18.

Enter the desired modifier values and click **“Save”**. This will save the entered information. You may also edit or delete values as needed.

Please note: If modifier values are configured in modifier prompts of screening choices then you will be limited to only those values when entering a modifier prompt value and will not be able to manually enter other values.



## Prospect Activity Maintenance

This area is for entering all possible ways of corresponding with a prospective member as well as their possible results. This information helps to determine a proper strategy for selling a membership to the prospect via the Prospect Management Module.

Opening the Prospect Activity Maintenance window displays the following:

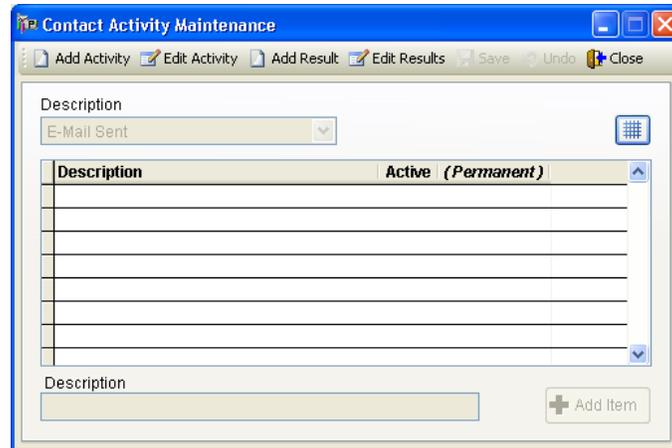


Figure 29-19.

There are 4 functions in this window:

- 1) Add Activity – Adds a new activity type. The user is prompted To add the activity in the text box labeled “Description” at the bottom of the window. Click the **“Add Item”** at the lower right to place it in the display grid.
- 2) Edit Activity – Allows editing of existing contact activity types.
- 3) Add Result – Adds a possible result of a contact activity. Choose the desired contact activity to add this new result via the dropdown box labeled “Description” at the upper left of the window.
- 4) Edit Results – Allows editing of existing contact activity results.

While editing the option is available to hide the contact activity type/result when working with Prospect Management Module. This is done by un-checking the box in the “Active” column of the display grid.

As with other maintenance windows there also a “Save” function to save work and an “Undo function to erase any work.

The only other setup that remains is for the Customer Marketing and Promotion window. These instructions will be explained later.



## Entering New Prospects

New prospective customers may be entered via the customer manager. From the Check In window, click **"Customer"** at the upper left then click **"Customer Manager"** in the dropdown box, as illustrated below:

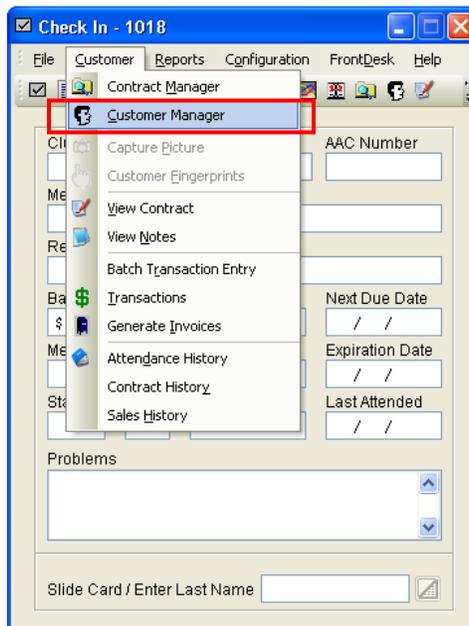


Figure 29-20.

The Customer Manager will open displaying the "General" tab as shown below. Click the  **"New"** icon at the top and a new blank page will appear:



The screenshot shows the 'Customer Manager' application window. The 'General' tab is selected, and the form contains the following fields:

- Status \***: Dropdown menu with 'Active' selected.
- Customer Number**: Text box containing '00000198'.
- PIN Number**: Text box.
- Last Name \***: Text box.
- First Name / MI \***: Text box.
- Driver License Number**: Text box.
- Sales/Employee Id**: Dropdown menu with '1018' selected.
- Street Address \***: Text box.
- Employer**: Text box.
- Employer Phone**: Text box with format '( ) - -'.
- City \***: Text box.
- State \***: Dropdown menu.
- Zip Code \***: Text box.
- Emergency Contact**: Text box.
- Emergency Phone**: Text box with format '( ) - -'.
- Phone Number**: Text box with format '( ) - -'.
- Social Security Number**: Text box with format '- - -'.
- Occupation**: Text box.
- Income**: Text box containing '\$0.00'.
- Birth Date**: Text box with format '/ /' and a calendar icon.
- Age**: Text box containing '0'.
- Gender**: Dropdown menu.
- Referred By Customer**: Text box with a person icon.
- Email Address**: Text box with an envelope icon.
- Referred By Method**: Dropdown menu.

Figure 29-21.

Enter in all the personal information you require. Please note all information marked with an asterisk (\*) is required by the software. Once all the information is entered, click **“Save”** in the upper part of the window. Click **“Edit”** and the **“Prospect”** tab towards the upper left. A screen will look similar to this:

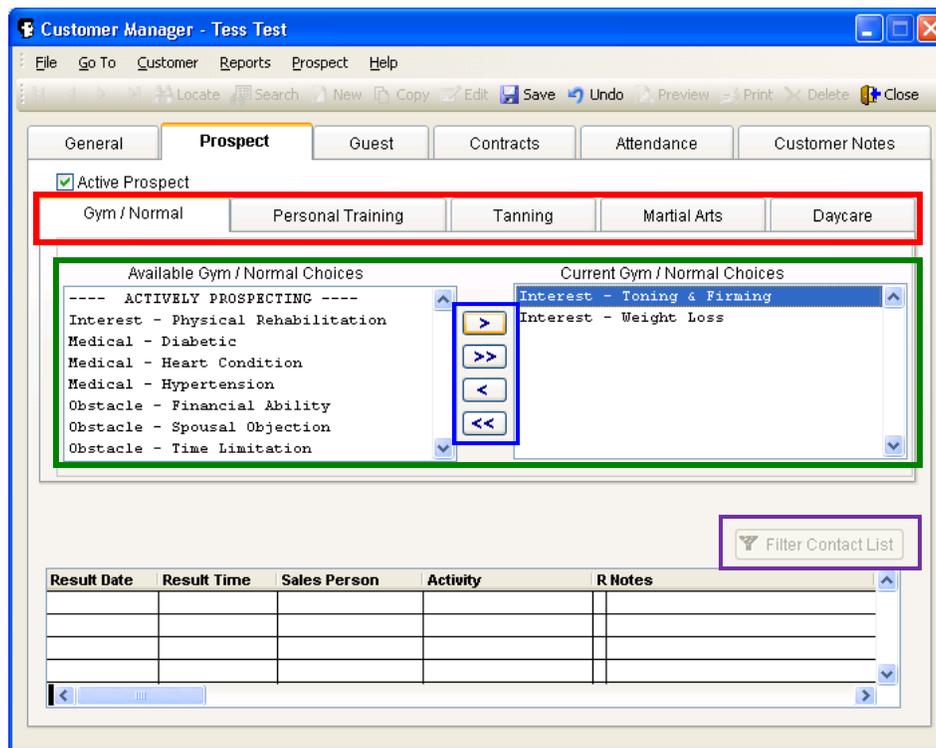


Figure 29-22.

Do the following steps in this window:

- 1) Check the "Active Prospect" box in the upper left area of the window. It is required for using this customer in the Prospect Management module.
- 2) Below the "Active Prospect" check box are the tabs (marked in red) representing the different services your business will offer contracts. There were set up in the Prospect Area Maintenance window. The remaining steps are the same no matter which prospect area tab is selected.
- 3) In the middle of the window are the "Available (Selected Prospecting Area) Choices" and "Current (Selected Prospecting Area) Choices". These were the items entered in the "Prospect Screening Choices Maintenance" window.
- 4) Between these two areas are a set of arrow buttons Their function is as follows:
  - a) The ">" button transfers a selected Screening choice from the Available box to the Current box.
  - b) The ">>" button transfers all screening choices for that Prospect Area from the Available to the Current box
  - c) The "<" button transfers a selected screening choice from the Current box to the Available box.
  - d) The "<<" button transfers all screening choices for that Prospect Area from the Current box to the Available box.

The above steps will allow a trainer or salesperson to have as much information as possible about the prospective customer in order to prepare a meeting, tour or demonstration specifically centered around those screening choices, thereby utilizing the time to deal only with the exact concerns of that customer.



## Navigate Prospect Management

Next we will address how to use the information you have entered in the various setups of the Prospect Management module for you every day operation of the AAC Front Desk System.

Open Prospect Management from the Check-in Menu Bar by selecting Front Desk and the click on **“Prospect Management”**. There are three navigational areas located in the upper left of the Prospect Management Module. They are highlighted in red and explained below:

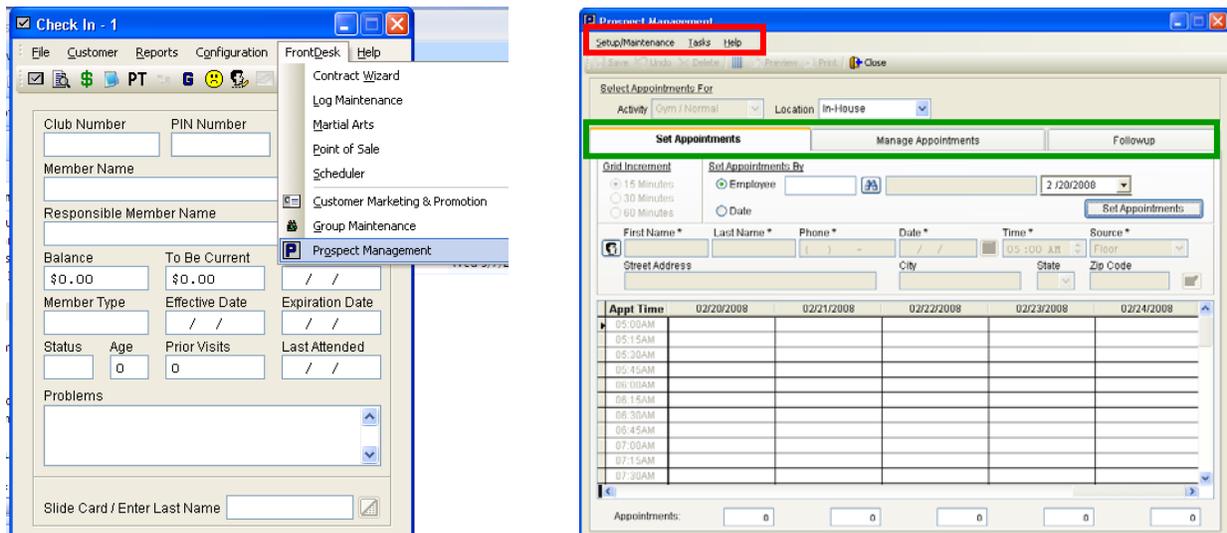


Figure 29-23.

- 1) **Setup/Maintenance:** These items were explained earlier in this tutorial
- 2) **Tasks:** These are various functions available in the Prospect Management module.
- 3) **Help:** Various help resources for the AAC Front Desk System



## Entering and Maintaining Prospect activities

There are three main areas in the Prospect Management window. They are highlighted in green above and listed below:

- 1) **Set Appointments:** Appointments can be made in this tab. A new prospective customer will be assigned a date, time and a specific trainer or salesperson. Any brand new prospective customers will be entered in the customer database and have a record in the Customer Manager.
- 2) **Manage Appointments:** Appointments made are listed here awaiting the results of those appointments.
- 3) **Followup:** Lists all completed appointments that will require follow up action. The type of follow up action taken can be documented here.

### Setting Prospective Customer Appointments

To set an appointment for a customer, open Prospect Management and click the “Set Appointments” button:

The screenshot shows the 'Prospect Management' window with the 'Set Appointments' tab selected. The interface includes a menu bar (Setup/Maintenance, Tasks, Help), a toolbar (Save, Undo, Delete, Preview, Print, Close), and a 'Select Appointments For' section with dropdowns for 'Activity' (Personal Training) and 'Location' (All Locations). Below this are three tabs: 'Set Appointments', 'Manage Appointments', and 'Followup'. The 'Set Appointments' tab contains a 'Grid Increment' section with radio buttons for 15, 30, and 60 minutes. The 'Set Appointments By' section has radio buttons for 'Employee' and 'Date', with a date field set to '6 / 3 /2008'. A 'Set Appointments' button is highlighted with a red box. Below this are input fields for 'First Name \*', 'Last Name \*', 'Phone \*', 'Employee \*', 'Time \*' (set to 05:00 AM), and 'Source \*'. There are also fields for 'Street Address', 'City', 'State', and 'Zip Code'. At the bottom, there is a table with columns for 'Appt Time' and five '(Employee)' columns. The table rows show times from 05:00AM to 07:30AM. At the very bottom, there are five input fields for 'Appointments:' with the value '0' in each.

Figure 29-24.

The red highlighted area displayed below shows where all data entry takes place.



Figure 29-25.

Here is a rundown of what info you will enter:

- 1) **Grid Increment:** Select how long your appointments will be. You may choose between 15, 30, or 60 minute increments. This may also be set in the Appointment Configuration window.
- 2) **Set Appointments By:** Appointments can be set by two different base criteria. They are:
  - a) **Employee:** The appointments can be set and displayed according to the employee who is hosting the appointment. An employee can be found via clicking the search icon (🔍). A search window will appear where entering the first few letters of the last name or ID of the employee will find them. After highlighting the proper employee in the search window, press the Select button and the employee name will appear in the text box to the right of the search icon. The appointment grid (highlighted in green) will show the appt times to the left of the rows. At the top of the columns will be the current and next six days consecutively.
  - b) **Date:** Simply select the date the appointment is supposed to occur. The times will once again be displayed in the left of the appointment grid. The columns will display the names of each employee assigned to host appointments. If you change the date, you will need to click the Set Appointments button again.
- 3) **Prospect Information Entry:** This is where the personal information of the prospect is entered in the Prospect Manager. This can be done two ways:



a) **Entering an already existing customer:** Click the “Customer Search” (🔍) button to the left of the First Name\* text entry box. This will allow you to search for the existing customer you wish to make an appointment for. Enter the first few letter letters of the last and highlight the correct customer. Click the “Select” button and the personal information of the selected customer will be transferred to each of the personal information text entry boxes.

b) **Entering a new prospect:** Enter each piece of personal information in the appropriate text entry box. All text entry boxes marked with an asterisk (\*) are required for entry into the system. Error messages stating the information is required will appear if information is not entered. Remember: All brand new prospects will automatically have records created for them in the Customer Manager.

4) After entering all required information, click the icon as shown below in red. The appointment will now be displayed for the selected employee.

The screenshot shows the 'Prospect Management' window with the following details:

- Activity:** Personal Training
- Location:** All Locations
- Grid Increment:** 15 Minutes (selected)
- Set Appointments By:** Date (selected), 6/5/2008
- Customer Info:**
  - First Name \*: FRED
  - Last Name \*: FLINTSTONE
  - Phone \*: (308) 249-1658
  - Employee \*: 1
  - Time \*: 09:00 AM
  - Source \*: Floor
  - Street Address: 456 ROCK AVE
  - City: BELLEVILLE
  - State: IL
  - Zip Code: 62226
- Appointment Grid:**

Appt Time	Sue Impey	(Employee)	(Employee)	(Employee)	(Employee)
09:30AM					
09:45AM					
10:00AM					
10:15AM					
10:30AM					
10:45AM					
11:00AM	Susie Stlinkpot				
11:15AM					
11:30AM					
11:45AM					
12:00PM					
- Summary:** Appointments: 1 0 0 0 0

Figure 29-26.



## Managing Prospective Customer Appointments

The Managing Appointments tab of the Prospect Manager is where the appointments in the Prospect Manager are tracked. Here is the view of the window:

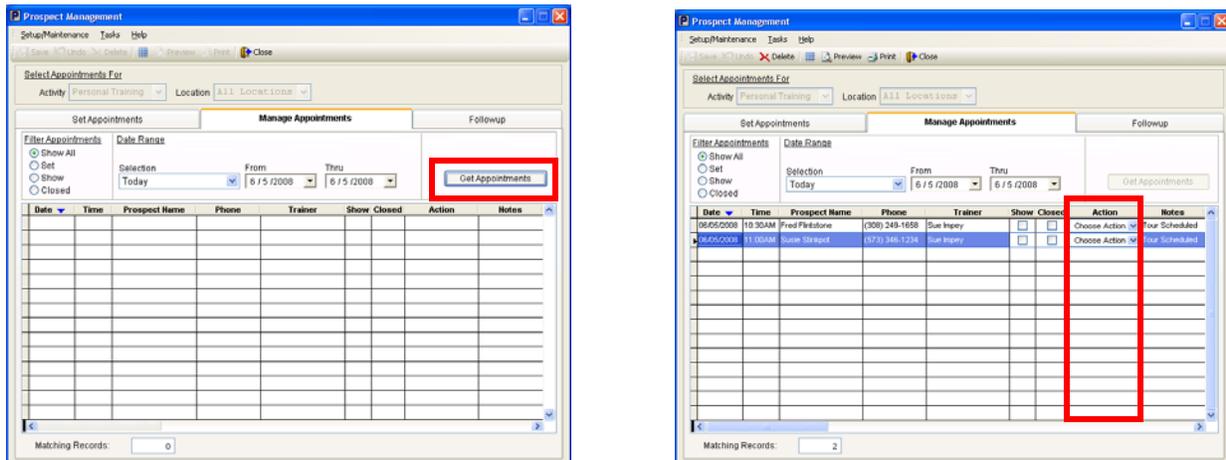


Figure 29-27.

The list of appointments requiring attention will appear in the display grid. They can be filtered by the following criteria:

- 1) **Filter Appointments:** Appointments can be filtered by the following criteria:
  - a) **Show All:** Displays all appointments in a given date range.
  - b) **Set:** Displays appointments within a given date range that have been made but not attended yet.
  - c) **Show:** Displays appointments within a given date range that were attended, but no contract was sold.
  - d) **Closed:** Displays appointments within a given date range resulting in a signed contract
- 2) **Date Range:** Selecting a date range of appointments to view can be done two ways:
  - a) **Selection:** Select a pre-programmed length of time via a dropdown box.
  - b) **"From" and "Thru":** Manually enter a date range of your choice.

Once the filters have been selected, click the **"Get Appointments"** button and the appropriate appointments will be displayed in the grid. You are now ready to enter the results of these appointments.

All but one column in the display grid is previously entered information concerning the appointment. The results are entered in the column labeled **"Action"** as shown in the red highlighted area illustrated above.

To manage an appointment, click the arrow to the right of the Action column of the selected appointment. A dropdown box appears with the following choices:

- 1) **Toured – No Sale:** A tour was given but did not result in a sale. The appointment will appear red and it be flagged for followup.
- 2) **Toured – Signed:** A tour was given and a sale is made. The contract wizard will start for entry of the new contract and the appointment will appear in green.
- 3) **Rescheduled Tour:** A window appears and a new date and time can be entered.





As with the Manage Appointments tab, there are two main filtering mechanisms to find pending follow-ups. The Date Range filter works the same as in the Management tab, so only the Filter Prospects (highlighted in red above) will be explained.

Filters must be created to use the Filter Prospects area highlighted in red on the previous page) of the Follow up tab. Click **“New Filter”** and the following window appears:

Columns to Show in Grid (Choose up to six in order preferred)		
( Col Sequence # )	Grid Column Width	Grid Heading
<input type="checkbox"/>	110	Activity
<input type="checkbox"/>	65	Act. Date
<input type="checkbox"/>	55	Act. Time
<input type="checkbox"/>	110	Result
<input type="checkbox"/>	65	Res. Date
<input type="checkbox"/>	55	Res. Time
<input type="checkbox"/>	88	Phone #
<input type="checkbox"/>	120	Trainer
<input type="checkbox"/>	80	Ref. Source
<input type="checkbox"/>	80	Activity Area
<input type="checkbox"/>	125 (varies)	Notes
	0	

Figure 29-29.

First, give the filter a name in the Filter Name text entry box and press enter. Next, under Select Prospects Where, check the different filtering criteria available. All specific filtering criteria can be chosen via the dropdown boxes on the right. The general filtering choices are:

- 1) **Contact Activity** – Lists the type of appointment or correspondence
- 2) **Contact Result** – Lists the result of the appointment
- 3) **Employee**
- 4) **Reference Source** – Lists the type of initial contact made for the appointment

When the filtering criteria have been selected, there are two further choices to make. They are:



- 1) **Is Equal To** – The search will list only what is selected in the dropdown box.
- 2) **Is Not Equal To** – The search will list all except what is selected in the dropdown box.

The lower area of the Prospect Filter Creation window is labeled **Columns to Show in Grid**. You may select up six different statistics to appear in the Follow up display grid.

Once finished with the Prospect Filter setup, click **“Save”** at the upper left to save the filter just created. You will be taken back up to the Follow-up tab of the Prospect Manager window. Once there a filter can be chosen display follow-ups to act upon. An already created filter can be changed by clicking the **“Modify Filter”** button directly below the Filter Selection dropdown box or be deleted by clicking the **“Delete Filter”** button.

Once the filter and the date range are selected, click the Get Prospects button to the right. The appointments will appear as follows:

The screenshot shows the 'Prospect Management' window with the 'Followup' tab selected. The 'Filter Prospects' dropdown is set to 'future fu'. The 'Date Range' is set from '6 / 5 /2008' to '7 / 5 /2008'. The 'Get Prospects' button has been clicked, resulting in 6 records found. The table below shows the list of appointments, with a red box highlighting the checkmarks in the 'Result' column for all six rows.

Prospect Name	Activity	Act. Date	Act. Time	Result	
FLINTSTONE, FRED	Follow Up	06/09/2008	12:00PM	Pending	<input checked="" type="checkbox"/>
STINKPOT, SUSIE	Follow Up	06/10/2008	05:00AM	Pending	<input checked="" type="checkbox"/>
STINKPOT, SUSIE	Follow Up	06/10/2008	09:00AM	Pending	<input checked="" type="checkbox"/>
FLINTSTONE, FRED	Follow Up	06/10/2008	10:00AM	Pending	<input checked="" type="checkbox"/>
ALTAS, NESE	Follow Up	06/13/2008	05:00AM	Pending	<input checked="" type="checkbox"/>
BOOP, BETTY	Follow Up	07/04/2008	05:00AM	Pending	<input checked="" type="checkbox"/>

Figure 29-30.



Select a type of follow up action to perform. Then select which prospects you are performing the action for. The checkmark in the checkboxes at the very right of the grid (marked in red) indicate which prospects the followup action will be done to. The system default is to select all prospects (checked). Simply uncheck boxes to exclude prospects from the present followup action. The checkbox at the very top right if the grid will select or exclude all displayed appointments. There are five different followup action choices. They are as follows:

- 1) **List Prospects** – Displays the information in the grid in printable report form.
- 2) **Document Prospect Contact** – Selecting this option displays the following window:

Figure 29-31.

In the Document Prospect Contact window enter how the contact was made by selecting an item from the Contact Type dropdown box as seen above. You may also enter / edit the date, time and employee who made the contact. You can also enter the outcome of the contact with the Response dropdown box. Notes of the contact can be entered as well.

- 3) **Send an E-Mail to Chosen Prospects** – An e-mail of your choice may be sent to the prospects.
- 4) **Print a Chosen Letter for Prospects** – Print a letter for mailing to selected prospects.
- 5) **Initiate a Marketing Campaign** - Begin a mail e-mail campaign sending prepared e-mails and printing prepared letters at given intervals. The setup for marketing campaigns will be dealt with in the next section of the manual.