Add a Prospect

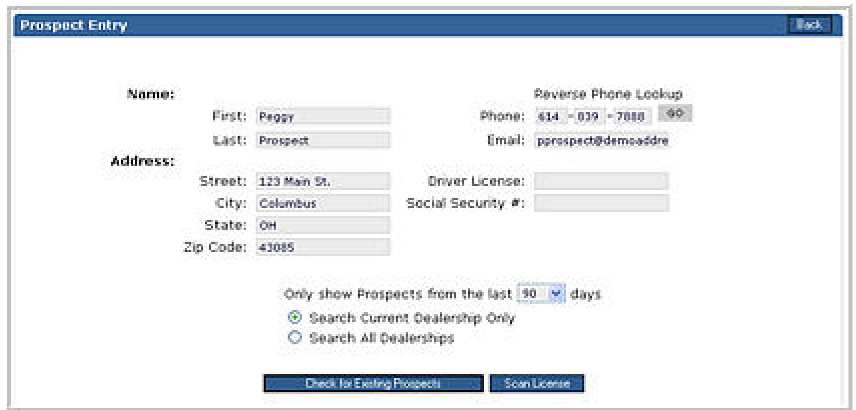
Quick Start Guide for All Users

Check for Existing Prospects

Prospects are added to the Web Control system when an email lead is received and parsed. You see these leads on the Web Control Prospects screen. In addition to receiving leads via email, you may also add prospects the system manually.

When adding a prospect, the system checks that you are not duplicating an existing prospect. This check is part of the Prospect Entry process. You may add a prospect from either the Web Control Home page or the Prospects page.

1. From the **Prospects** section, click **Add Prospect** from the links on the left navigation.
2. On the **Prospect Entry** screen, type the prospect's information.
   - **NOTE:** For a broader search, complete fewer of the search fields.
3. Click **Check for Existing Prospects**.



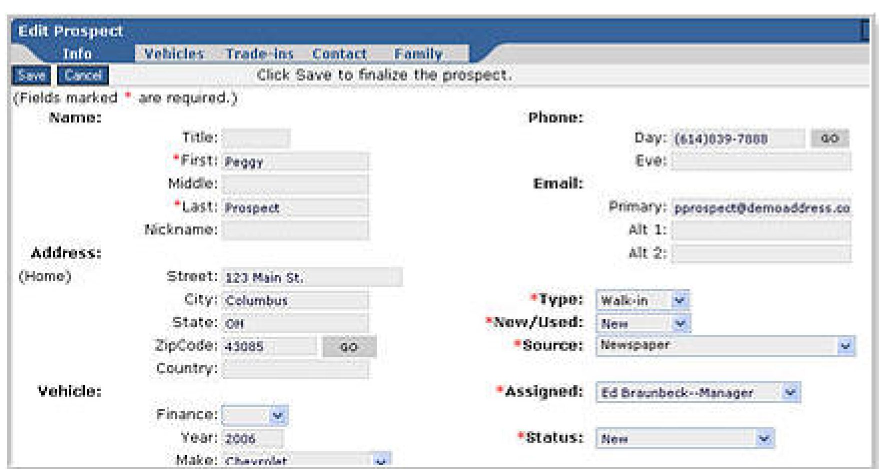
4. When the **Prospect Search Results** display, the system states that no matching prospects were found or displays possible matches.
   - If the prospect was not found, you can add the prospect by clicking the **Add Prospect** button, or you can search again by clicking the **Search Again** button.
   - If possible matches are found, you can choose to look at the record details by clicking the **Details** button or edit the record by clicking the **Edit** button. If none of the records exactly matches the prospect you want to enter, you can add the prospect by clicking the **Add Prospect** button.

Add a New Prospect

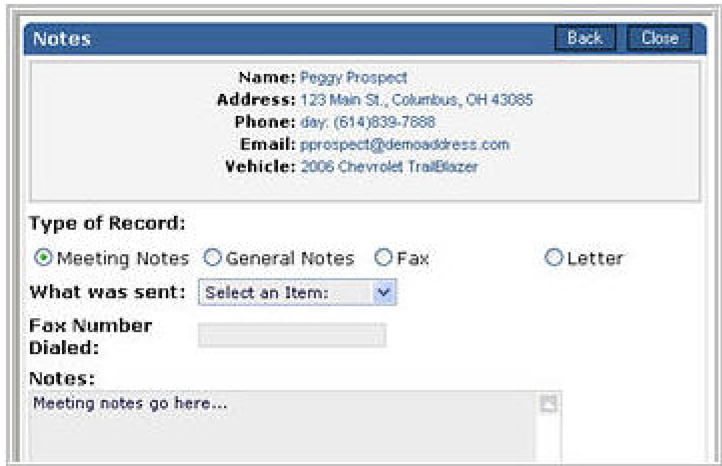
When you choose to add a new prospect, the Edit Prospect page appears so you can add more information about the prospect.

1. On the **Edit Prospect** screen, type information in as many fields as possible.

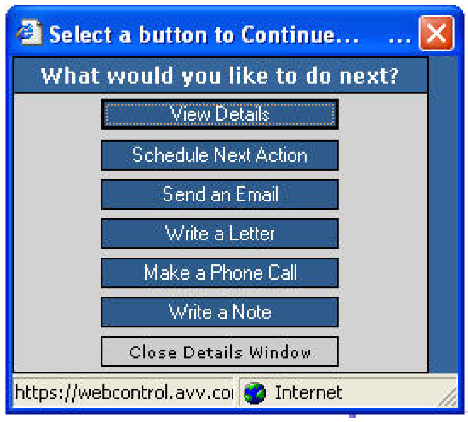
   Notes:
   - The red Asterisks indicate Required fields.
   - All the fields except Type may be edited later.



2. Click **Save** to save the record. The system assigns a unique Prospect ID to the record.
3. When the **Notes** screen displays, complete the form to add a note to the record.
4. Click **Save Record**.



5. Select the next step by clicking a button from the list of actions. The choices include:
   - View Details – This option takes you to the Prospect detail page.
   - Schedule Next Action – This option takes you to the Schedule Next Action page.
   - Send an Email – This option takes you to the Send Email page.
   - Write a Letter – This option takes you to the Create Letter page.
   - Make a Phone Call – This option takes you to the Phone Call Record page.
   - Write a Note – This option takes to you the Notes page.
   - Close Details Window – This option closes the Prospect Details window.



6. After completing the selected action or closing the Prospect Details window, you can also select from another set of actions or choose to print forms.